

REQUEST FOR STATEMENT OF QUALIFICATIONS FOR THE DEVELOPMENT OF AFFORDABLE SENIOR GROUP HOUSING ON ASSESSOR PARCEL NUMBERS 281-182-17 and -18 LOCATED BETWEEN 12TH AND 13TH STREET IN RAMONA, CA.

Opportunity to develop and operate an Affordable Senior Group Housing Community on County owned property via sale or ground lease. The Site is adjacent to the County owned Ramona Library, located between 12th and 13th Street in the unincorporated community of Ramona, and will become part of the future Ramona Intergenerational Community Campus (Assessor Parcel Numbers 281-182-17 and -18). Interested entities must submit a Statement of Qualifications to be pre-qualified to propose on the project. The most qualified entities will subsequently be invited to participate in the Requests for Proposals.



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1.0 Introduction and Overview

1.1 Purpose of Procurement

The County of San Diego (“County”) is a political subdivision of the State of California. The County operates pursuant to State of California law and a charter and is governed by an elected five-member Board of Supervisors. The County is seeking Statements of Qualifications (“SOQ”) from respondents who are interested in qualifying for the development and management of an Affordable Senior Group Housing community located between 12th and 13th Street in the unincorporated community of Ramona (Assessor Parcel Numbers 281-182-17 and -18) (“Site”).

This solicitation will consist of two phases, a Request for Statements of Qualifications (“RFSQ”) phase followed by a Request for Proposals (“RFP”) phase. The solicitation is intended to identify and engage a development team that has a demonstrated track record and capacity to successfully design, entitle, build, finance, and operate a low-income senior group housing development. Respondents interested in proposing must prequalify through this process. If multiple entities intend to propose together, only one of those entities must prequalify.

The County’s ultimate objective for this Site is to either enter into a long term ground lease or grant the Site, incorporating deed restrictions or lease requirements which will restrict use of the land for 55 years to living units for low-income seniors and certain ancillary uses, as described in more detail below. The preferred method of Site control (lease vs. purchase) shall be outlined by the developer in the RFP submittal. Development teams should consider Article 34 requirements in the California Constitution and the Surplus Land Act when determining a long-term lease or a purchase.

The Site is adjacent to the County-owned Ramona Library and will become part of the future planned Ramona Intergenerational Community Campus along Main Street between 12th and 13th Street in the unincorporated community of Ramona (Assessor Parcel Numbers 281-182-17 and -18).

The County’s goals for this solicitation are as follows:

1. Construct a Senior Group Housing community, as defined in the County of San Diego Zoning Ordinance Section 1265, and below in Section 3.2, with 100% of the units dedicated to low-income seniors.
2. Construct and open the housing in the most expeditious way possible, while maintaining high quality design and construction.
3. Construction of a Senior Center open to the public, to satisfy the 25% required commercial component set forth in the Ramona Form Based Code Section 8752.g.
4. Dedicate a trail easement through the site connecting to the County’s planned Santa Maria Creek Greenway.
5. A Senior Group Housing development that complements the aesthetics and character of the Ramona community and the existing County Library, and which will integrate appropriately with the varied uses planned for the adjacent Ramona Intergenerational Community Campus.



The foregoing objectives set forth the County's anticipated goals and are anticipated to be reiterated in the RFP as the scoring criteria. The County, however, may modify these goals before or during the RFP process. Proposals submitted in response to the RFP will be fully evaluated against the criteria set forth in the RFP.

1.2 Background

Since October 1999, the community of Ramona has been pursuing the concept of a Ramona Intergenerational Community Campus (RICC) to accommodate affordable senior housing, a new Family Resource Live Well Center, a new Ramona Library, a senior center and other community facilities, along with connectivity of the RICC to the proposed Santa Maria Creek Greenway Park. In furtherance of that plan, the County has acquired 15.16 acres along Main Street, between 12th and 13th Street, and constructed the 21,500-square foot Ramona Library. The portion that is being made available for the senior housing element through this solicitation is approximately 7.86 acres, of which approximately 4.6 acres are developable, and is identified as Assessor Parcel Numbers 281-182-17 and 281-182-18 (Site).

1.3 Overview of Two Step Procurement Process

The procurement will be conducted in two phases, beginning first with this RFSQ phase allowing respondents to submit qualifications. The second phase will consist of an issuance of an RFP. Of those respondents found to be qualified in this RFSQ stage, the County may elect to invite only the top three to five most qualified respondents to participate in the RFP phase, as determined by County.

Phase I – Request for Statement of Qualifications

The primary purpose of this RFSQ is to qualify development teams for eligibility to participate in the second phase of this two-phase process. In order to participate in the RFP stage, respondents must submit a SOQ in accordance with this RFSQ's requirements. This will enable the County to qualify respondents and their key personnel with regard to the ability to provide the experience, capacity and financial resources necessary to complete the County's objectives. The SOQs will be thoroughly evaluated by the County's Qualification Evaluation Committee (QEC), appointed by the Director of the Department of General Services or a designee. The specific RFSQ submittal requirements are described in Section 4 of this RFSQ.

Phase II – Request for Proposals

Those respondents invited to submit proposals in Phase II of this procurement will be asked to submit fully developed project concepts for all components of the project, including preliminary design drawings, financing strategies, pro formas, and details addressing the affordable housing component proposed for the Site. The proposals will be thoroughly evaluated by Source Selection Committee (SSC), appointed by the Director of the Department of General Services. The development team providing the proposal that best aligns with the County's stated goals, as determined by the County, will be recommended for award.



2.0 Procurement Schedule, Instructions and County Contact

2.1 Procurement Schedule

The solicitation, receipt, and evaluation of the RFSQ responses and the process for selecting a development team is anticipated to follow the timeline below. The County reserves the right to alter the dates below at any time. In the event of any change to the outlined schedule, the County will issue an addendum to the RFSQ. All addenda to the RFSQ will be posted at www.sdcre.com. At the County's discretion, the County may conduct interviews with the respondents.

It will be the respondent's responsibility to determine if any addenda to this RFSQ have been posted on at www.sdcre.com up to the final date of submittal.

This procurement's anticipated timeline is as follows:

Issuance of the RFSQ:	Nov. 2, 2020
Site tour:	Nov. 9, 2020 - 11:00 AM
Deadline for Submittal of Questions:	Nov. 16, 2020 – 4:00.00 PM (Pacific Time)
Submittal Due Date:	Nov. 30 – 4:00.00 PM (Pacific Time)
Interviews of respondents (as needed):	December 2020
Shortlisting of qualified respondents to participate in RFP:	December 2020
RFP released to shortlisted respondents:	January 2021
Board Hearing set to receive RFP proposals:	March 2, 2021 9:00 AM (Pacific Time)

The Site tour will comply with the County of San Diego's COVID-19 Order of the Health Officer and Emergency Regulations in effect at that time. Prospective respondents should send only those representatives who are essential to formulating a complete response to the RFSQ and subsequent RFP. Site tour attendees shall practice social distancing and shall wear face masks for the duration of the tour. If all attendees are unable or unwilling to comply with the requirements, the County will cancel the tour.



2.2 Submission Instructions

In addition to the requirements set forth in Section 4 of this RFSQ, submissions shall conform to the requirements of this Section 2.2. Submissions shall be delivered no later than **November 30, 2020 by 4:00.00 PM (Pacific Time)** to:

County of San Diego
DGS - Real Estate Services Division
Attention: Angela Jackson-Llamas, Project Manager
RE: "Development of an Affordable Senior Group Housing Community on Assessor Parcel Numbers 281-182-17 and -18 in the unincorporated community of Ramona RFSQ"
5560 Overland Avenue, Suite 410
San Diego, California 92123

Submissions received by e-mail or fax will not be accepted.

Respondents shall submit a completed SOQ Package as follows:

- a) Organize content to correspond to the applicable question or requirement. All forms, responses and attachments shall be sequentially numbered to correspond to the applicable question or requirement.
- b) If submitting a separate confidential/proprietary exhibit as part of the SOQ, it shall be submitted as follows:
 - i. Confidential or proprietary information shall only be submitted under the confidential/proprietary exhibit within the completed SOQ Packages. Responses that include the confidential or proprietary information shall refer to the response contained within the confidential/proprietary exhibit (for example, if a submittal requirement requires staff Social Security Numbers, the response to the requirement shall refer to the section of the confidential/proprietary exhibit where the Social Security Number is provided).
 - ii. Complete, sign and return within the SOQ Package Form A - Indemnification Agreement located in Appendix B.1.
 - iii. Response documents are generally subject to disclosure pursuant to the California Public Records Act as set forth in California Government Code section 6250, *et seq.* While the County will, subject to respondent's completion of an unaltered Form A, not release documents contained in the confidential/proprietary exhibit, the County will not treat pricing or terms and conditions as confidential. Confidential/proprietary exhibits will be examined prior to evaluation, and price or terms and conditions may be removed, or the County may declare a SOQ non-conforming because of the inclusion of price or terms and conditions in the confidential/proprietary exhibit.

All SOQs become the property of the County. A respondent may request the return of its SOQ upon cancellation of the RFSQ as specified in Section 6.2 or withdrawal from the RFSQ as specified in Section 6.1.3. The County may grant or deny a request to return at SOQ at its sole discretion.



It is understood and agreed by the respondent in submitting an SOQ that the County may, as allowed by law, withhold some or all of the documents regarding this procurement.

2.3 County Contact for Questions

Interested parties should direct inquiries to:

County of San Diego
DGS - Real Estate Services Division
Angela Jackson-Llamas, Project Manager
5560 Overland Avenue, Suite 410
San Diego, California 92123
Telephone: 619-214-1378 (cell.)
Fax: 858-694-2369
E-mail: Angela.Jackson-Llamas@sdcounty.ca.gov

2.4 Questions

Questions and requests for clarification related to the interpretation of this RFSQ shall be submitted in writing by e-mail prior to 4:00.00 p.m. (Pacific Time) on November 16, 2020 to the person identified in Section 2.3. No questions or requests for clarification will be accepted via telephone, and any oral explanations or instructions shall not bind the County. If the County determines that clarification is necessary, an addendum will be issued in response to questions or requests for clarification received in a timely manner. Respondents shall not otherwise communicate with County officials, be it either elected or staff, about the procurement. Failure to comply with this requirement may be cause for the County, in its sole discretion, to disqualify the respondent.

3.0 Proposed Development Opportunity

3.1 Area Overview

The Site is located in the unincorporated community of Ramona within the rural East County area of San Diego County. The town center is referred to as Ramona Village with commercial services mostly provided along Main Street (Highway 67) with a few streets on either side of Main Street zoned for less intense commercial uses. The side street commercial areas are in transition from older single-family residential to commercial use and from industrial storage to commercial uses. Existing development is interspersed with vacant commercial land, some of which remains vacant due to flood and vernal pool characteristics that reduce utility. The area beyond the town center is designated for a gradual decrease in residential density from Ramona Village in concentric circles allowing for preservation of the rural character.

The Site is located between 12th and 13th Streets north of the Ramona Library. This location to the south of Walnut Street and to the north of Main Street is designated for rural commercial use. Santa Maria Creek flows east to west just south of Walnut Street. Flood issues impact properties along the creek bed on both sides of Walnut Street. 12th Street is a paved road that terminates at the Site. 13th Street is a County



maintained dirt road along the subject frontage but is regularly washed out by Santa Maria Creek during heavy rainfall. Walnut Street is a dirt road that terminates east of the Site. The anticipated County of San Diego 13th Street Bridge Project is currently being designed and would improve a portion of the 13th Street and Walnut Street frontages.

3.2 Site Description

The San Diego County Assessor's records indicate the Site's gross size is 7.86 acres. Approximately 6 feet would be required to be dedicated along the 13th Street frontage and the cul-de sac at 12th Street, a closed street in this location, for any proposed development using these streets as access. If Walnut Street is developed to its full width, wetland habitat would be disturbed. Future development of the Site would not rely on the Walnut Street frontage for access as it is the farthest frontage from the developable portion of the Site, would be controversial, and would involve construction of a costly bridge and/or expensive habitat mitigation. The usable area outside of the 100-year floodway is estimated at approximately 4.6 acres net of required street dedications. The area in the floodway is approximately 3.26 acres.

The southern portion of the Site has been filled and re-compacted to raise it above base flood elevation. The status of the grading permits for this work is not known. To the north of the filled area, the topography slopes down gently towards Santa Maria Creek. Large boulders have also been placed along the 12th and 13th Street frontages.

The County intends to complete the California Environmental Quality Act (CEQA) and Hazardous Materials review of the Site. The Developer will be responsible for designing, entitling, financing, building and operating the proposed development on the Site. The Developer will be responsible for all community engagement activities associated with each phase of development.

The Site currently has an allowed use for Group Residential as defined in County of San Diego Zoning Ordinance Section 1265. A Senior Group Residential (Senior Group Housing) project could be developed under a Minor Use Permit and Site Plan permit approved by the Zoning Administrator. Group Residential refers to the residential occupancy of living units by persons who do not live together as a single housekeeping unit but have a common kitchen facility. Senior Group Housing units may have individual kitchens and still be in conformance with the zoning ordinance so long as a common kitchen facility is also available.

Site Characteristics:

- Irregularly shaped parcel
- Lot size – approximately 7.86 acres
- Split zoning and land use designations. The southern approximately 4.6-acre area of the Site has a Rural Commercial (C-4) land use designation which allows residential use at a maximum density of 2 dwelling units per gross acre and RM-V4 (General Zoning District) which allows uses on the southern portion of the Site are rural commercial uses or mixed use at a maximum residential



density of 9.2 dwelling units on 4.6 acres. The northern approximately 3-acre portion mostly has a land use designation of RL-20, Rural Lands allowing extremely low density of 1 DU/20 acres. The northwest corner has a land use designation of High Impact Industrial on approximately 0.26 acres but is not usable due to floodway and wetland habitat restrictions. The northern portion has a split zoning designation of RM-V2 (Rural Zoning District) and RM-V1 (Natural Zoning District). The aforementioned information is excluding any applicable density bonuses for affordable housing. Refer to the following Density Bonus Table in Section 6360: <https://www.sandiegocounty.gov/content/dam/sdc/pds/zoning/z6000.pdf>

- Over-excavation and fill were reported by the previous property owner to have been completed on the southern portion of the Site. County Department of Environmental Health has recommended soils testing, which County will perform prior to development of the Site.
- A 25-foot wide easement for a 36-inch water pipeline in favor of the City of San Diego bisects the Site in the vicinity of the northern edge of the RM-V4 portion of the Site. This pipeline is known as the Sutherlands-San Vicente conduit of the City of San Diego. This easement will require consideration for any proposed new use.

3.3 Review of Planning Documents

Development teams planning to submit RFSQ responses should review the County of San Diego's General Plan, Zoning Ordinance, the Ramona Village Form Based Code and other relevant documents to understand the development standards for the Sites prior to preparing design concept narratives and basic concept drawings. County makes no representations as to the accuracy of the information contained in this RFSQ. Developer shall perform necessary due diligence prior to submitting the SOQ.

3.3.1 Policy Context

San Diego County is facing a severe housing affordability crisis, particularly for lower-income households. The County's Consolidated Plan (Con Plan) and the County's General Plan Housing Element are the primary housing policy documents detailing housing needs by household type and income levels, as well as setting forth policies and programs to address these needs.

It is anticipated that the development team will propose the structure of the transaction (ground lease vs. purchase) and should review and consider Article 34 and the Surplus Land Act prior to submitting a proposal.

Funding programs exist to support the development of affordable housing, including most importantly:

- Federal and State Low Income Housing Tax Credits (4 and 9 percent)
- Affordable Housing and Sustainable Communities (AHSC) Program



4.0 Submittal Requirements

A complete, concise and professional response to this RFSQ will enable the County to identify the most qualified respondents. Respondents shall format the submittal as follows:

- No more than seventy-five (75) double-sided pages, including any appendices and required forms; and
- Minimum font size of 11.

Submittals shall be comprised of:

- One (1) unbound original copy;
- Ten (10) hard copies;
- One (1) “high quality” digital PDF file (on a flash drive, CD or DVD); and
- One (1) separately-sealed envelope with confidential/proprietary information if applicable (see Section 2.2).

Each section of the SOQ shall be tabbed and labeled in the order shown below.

4.1 Submittal Cover

The submittal cover shall provide the following information:

- RFSQ title;
- Submittal date;
- Respondent name;
- Respondent website address (if available); and
- Principal contact name, address, telephone number, facsimile number, and email address.

4.2 Table of Contents

The table of contents shall be complete and clear indicating section headers and pages.

4.3 Transmittal Letter

A duly authorized official of the respondent must execute the transmittal letter (preferably in blue ink). For respondents that have created joint ventures, partnerships, limited liability companies or other associations to participate in this procurement, the transmittal shall be appended with letters on the letterhead stationery of each equity member, executed by authorized officials of each equity member, stating that representations, statements and commitments made in the SOQ on behalf of the equity member’s firm have been authorized by, are correct, and accurately represent the role of the equity member’s firm in respondent team.

4.4 Executive Summary

Include an executive summary that conforms with and includes the following:

- Does not exceed two (2) pages;
- Written in a narrative or bullet point summary, non-technical style;



- Contains sufficient information for reviewers with both technical and non-technical backgrounds to become familiar with respondent's SOQ and the respondent's ability to satisfy the financial and technical requirements of the project(s); and
- Any relevant information the respondent believes is necessary to introduce its team to the County.

4.5 Identify the Development Team

Submittals shall include the information required below on the respondent, and as applicable, respondent's team. At a minimum, the submittal shall identify the lead development firm, joint venture partner firms, financial partners, lead planning and design firms and other proposed partners or consultants:

- Primary/lead developer and development partners; and
- Members of a joint venture, partnership, limited liability company or other associations created to participate in this procurement.

Each of the foregoing entities and individuals shall complete Form C in Appendix B.3, Form D in Appendix B.4, and Form E in Appendix B.5.

Additionally, provide the following:

- Primary/lead developer's project lead (person who will provide overall project oversight and management); and
- Development partner(s) and consultants (if any) lead(s) (person(s) who will provide day-to-day oversight and management for the partner(s) component of the development).

For each individual lead identified above, provide the following:

- Name
- Position within the company
- Address
- Telephone number
- Facsimile number
- E-mail address

4.6 Respondent/Developer Experience

The respondent must provide the following information about itself or, if relying on the experience of its team, information from the team:

4.6.1 Technical Capacity

- Describe the organization's capability to manage the project as proposed.



- Describe the project team’s experience in acquisition, rehabilitation, construction and/or management of housing with affordability restrictions and in particular, any experience with senior group housing.
- Describe your organization’s ability to deliver high-quality services to low-income residents
- Provide the following information:
 - Number of affordable rental housing developments/units completed.
 - Number of affordable rental housing developments/units currently owned.
 - Number of affordable rental housing developments/units currently managed.
 - Number of rental housing developments/units in development phase (funding committed but not ready for occupancy).

4.6.2 Qualifying Project Examples

Submit at least three (3) examples of multifamily housing developments, where at least two (2) have 100% of the units for low-income seniors and where the developer was primarily responsible for the development. To the extent possible, list developments that have been completed within the past ten (10) years.

- For at least two (2) of the three (3) developments listed, the development value must have exceeded \$20 million.
- For at least one (1) of the three (3) developments listed, include one (1) LEED Silver certified (or international equivalent) project of similar nature to that which is proposed in the SOQs.
- At least one (2) of the three (3) developments listed above must have been financed using Low-Income Housing Tax Credits (LIHTC) or other public financing subsidies.
- At least one (1) of the three (3) developments listed above must have included a senior housing component

For each development listed above, provide the following:

- Award date
- The name and telephone number for the developer’s lead
- Development location
- Development description
- Client type (e.g. government, private party)
- Client contact information
 - Name
 - Title
 - Address
 - Telephone number
 - Email address (if available)
- Mix of housing and services included in the development



- Funding sources, tax credits or government incentive programs used
- Affordability restrictions (affordability period and percentage of units affordable)
- Target population(s) served
- Size of the development:
 - Total square feet
 - Number of buildings
 - Total acreage
 - Total number of floors
 - Total number of units/rooms/parking/square footage allocated to each use
- Type of construction
- Construction start and completion date
- Total development value
- If LEED certified (or international equivalent) and at what level
- Date of acquisition and type; i.e., purchase vs. ground lease
- Date of disposition (if applicable)
- Photo(s) of development
- Other amenities (recreation rooms, playgrounds, and the like)

Individual project examples shall not exceed three (3) pages: one (1) or two (2) pages for above-required information and one (1) page for images. While the minimum number of developments is set forth above, respondent may submit up to five (5) qualifying project examples. The development descriptions shall not exceed fifteen (15) pages in the aggregate.

Respondents are encouraged to provide examples where personnel identified in Section 4.5 and Section 4.7 and/or members of a joint venture, partnership, Limited Liability Company or other associations created to participate in this procurement have collaborated on the same project.

4.7 Project Personnel

Identify the key personnel. The persons listed will be considered committed to the development with no substitutions allowed without prior written approval by the County. A resume or biography for each key personnel assigned to the project, including partners and consultants, shall be submitted and shall not exceed one (1) page. At a minimum, the key personnel shall include those personnel listed below:

1. **Project Executive.** A Project Executive with at least ten (10) years of experience as a project executive and having worked on a minimum of two (2) low-income multi-family senior developments, each of at least \$20 million. The Project Executive shall be an individual with the authority to make binding decisions on behalf of the developer through the design and construction phases of the development and shall have the overall responsibility for ensuring the development is delivered in accordance with the disposition and development agreement.



2. **Project Manager(s)**. Project Manager(s) with at least ten (10) years of experience as a project manager and having worked on a minimum of two (2) low-income multi-family senior developments, each of at least \$20 million. The Project Manager shall be an individual with authority to make binding decisions on behalf of the developer through the design and construction phases of the project and shall be responsible for managing and coordinating the entire development process, including budgeting, scheduling, planning, design, construction, and any other processes related to the design and construction of the project. At least one (1) development shall be a development listed in the respondent list of qualifying project examples in section 4.6.
3. **Architect**. An architect with at least ten (10) years of experience as a lead designer/architect who has worked on a minimum of at least three (3) multi-family residential projects containing a low income component, LEED certified, within the last ten (10) years. At least one (1) project shall be a project listed in the respondent list of qualifying project examples.
4. **Other Key Personnel**. Other key personnel of respondent's development team not listed above that are listed in the organization chart at an equal or higher level than those key personnel listed above.

4.8 Organization

Provide an organization chart containing the names of all key personnel, any joint venture partners and consultants identified in Section 4.5 and Section 4.7 with titles, and their specific task assigned for this development.

4.9 Developer References

Provide references as follows:

- At least three (3) references (company references) for the primary/lead developer and, if applicable, at least (3) references for members of a joint venture, partnership, limited liability company or other association created to participate in this procurement. At least one (1) reference must be from a government agency for which the developer has managed or developed multi-family affordable housing.
- At least three (3) references for each key personnel identified. The references shall be from clients for whom they served in capacities substantially similar to those in which they will serve on this project.

References shall include the following:

- Reference's full name;
- Employer or entity for which individual was affiliated during the reference period;
- Address;
- Telephone number; and
- Email address.



4.10 Financial Information

Provide the following financial information:

- Most current unaudited financial statement on a year-to-date basis including balance sheet, income statement and cash flow statements. Items submitted under this section will not count against the maximum page count for the RFSQ response.
- Last three (3) years of audited financial statements prepared by an independent certified public accounting firm that include a balance sheet, income statement, cash flow statement and associated notes to the financial statements. If audited financial statements are not available, then provide the last three (3) years of tax returns submitted to the IRS. If a respondent is a sole proprietor or a wholly owned corporation owned by a single individual, and the developer will rely on the financial assets of the sole proprietor or single owner of the corporation, then the individual's tax returns and financial information must also be disclosed. Audited financial statements are not required of federally insured banks or similar financial institutions. Items submitted under this section will not count against the maximum page count for the RFSQ response.
- Each of the entities and individuals listed in Section 4.5 shall complete Form F in Appendix B.6, Form G in Appendix B.7, and Form H in Appendix B.8 to disclose financial information regarding projects completed in the last 10 years, projects currently under construction, and projects currently in the development review process: the total project cost, amount of equity placed, the source of the equity, amount financed and the source of the financing. The listing of projects should include any projects identified under Section 4.6.2 - Qualifying Project Examples but is not limited to those projects under Section 4.6.2.
- Any letters of interest or commitment letters from potential lenders or equity partners

For confidential/proprietary information, refer to Section 2.2.

4.11 Litigation and Bankruptcy History

Disclose any litigation and/or bankruptcy information using Form C in Appendix B.3. Respondent shall disclose whether during the past ten (10) years, the developer, or joint venture partner, including their parent corporation or subsidiary or affiliated corporation as well as any of the developer's officers, principal members, major shareholders or investors have been adjudged bankrupt, either voluntarily or involuntarily, or have been involved in litigation relating to a development project, either voluntarily or involuntarily. For confidential/proprietary information, refer to Section 2.2.

5.0 Evaluation Process and Criteria

The County's Qualification Evaluation Committee (QEC), appointed by the Director of the Department of General Services, or designee, will evaluate qualifications of the respondents following the process and criteria below.



5.1 Pass/Fail Criteria

The County's Qualification Evaluation Committee will evaluate each SOQ for responsiveness based upon the respondent providing all of the information required to be submitted by this RFSQ.

A respondent that fails to provide all of the required information may be determined to be not qualified to participate in the RFP phase of this procurement. Pass/Fail will be determined solely at County's discretion in accordance with the criteria set forth in the RFSQ.

The County reserves the right to request clarification and/or additional information if deemed necessary. Such clarifications and/or additional information shall be submitted by the respondent as an addendum to the SOQ upon County's request. The fact that the County may request such clarification from one respondent does not obligate it to seek similar clarification from any other respondent. The County may waive any informality or irregularity in the responses received.

5.2 Secondary Scoring Criteria

The County may, at its sole discretion, conduct a second review of the SOQ for firms that meet all of the Pass/Fail criteria based upon the secondary scoring criteria identified in this Section. The second review will evaluate each respondent by evaluating the same information provided as required by Section 4. The criteria will be weighted in the following descending order of importance:

- Respondent/developer/developer members experience (including technical capacity, qualifying project examples and references);
- Experience with using Low-Income Housing Tax Credits (LIHTC) or other public financing subsidies to develop affordable housing;
- Key personnel experience (including references);
- Organization; and
- Financial information, litigation and bankruptcy history

The County may, at its sole discretion, elect to invite only the top three to five respondents ranked as the most qualified to participate in the RFPs.

6.0 Disclosures and Additional Information

6.1 County's Rights Pertinent to this Procurement

6.1.1 Approval

Any proposed lease or sale resulting from the procurement shall be subject to final approval by the County's Board of Supervisors.

6.1.2 County Commitment

- a. County shall have the right to reject or accept any or all SOQ, or any part of a SOQ for any reason at its sole discretion. Incomplete submittals or submittals with incorrect information may be cause for disqualification in the County's sole discretion



- b. This RFSQ does not commit the County to award. This RFSQ does not commit the County to pay any cost incurred in the submission of the SOQ or in making necessary studies or designs for the preparation of the SOQ. No reimbursable cost may be incurred in anticipation of the approval of the agreement contemplated by this RFSQ.
- c. No prior, current, or post award communication with any elected official, officer, agent, or employee of the County shall affect or modify any terms or obligations of this RFSQ except as explicitly provided for in this RFSQ.

6.1.3 Late, Modified or Withdrawn SOQ

- a. Any SOQ received after the exact time specified for receipt will not be considered unless it is determined by the County that the late receipt was due solely to mishandling by the County after receipt by the County.
- b. SOQ may not be modified after the due date, except a modification resulting from the County's request for a clarification, or an addendum to the SOQ.
- c. SOQ may be withdrawn by written notice signed by a duly authorized representative of respondent.

6.1.4 Knowledge of RFSQ and Proposal Conditions

Before submitting a SOQ, respondents shall carefully read all sections of this RFSQ, including all forms, schedules and exhibits, and shall fully inform themselves as to all existing conditions and limitations.

6.1.5 Diligence Material

If provided, diligence material is subject to the following disclaimer: Neither the County nor any of its agents, advisors, or representatives has made or makes any representation or warranty, express or implied, as to the accuracy or completeness of any diligence material. Without limiting the generality of the foregoing, the diligence material may include certain assumptions, statements, estimates, and projections provided by or with respect to the County. The assumptions, statements, estimates, and projections reflect various assumptions made by the County, which assumptions may or may not prove to be correct. No representations are made by the County as to the accuracy of any assumptions, statements, estimates, or projections.

6.1.6 Duty to Inquire

Should a respondent find discrepancies in or omissions from the RFSQ or other documents, or should the respondent be in doubt as to their meaning, the respondent shall at once notify the County in writing pursuant to Section 2.3 and 2.4 of this RFSQ. If the County determines that clarification is necessary, a written addendum will be issued and posted on the County's website at: www.sdcre.com. It is the respondent's responsibility to periodically check the above website for any addenda. It will be the respondent's responsibility to determine if any addenda to this RFSQ have been posted on the website up to the final date of submittal. The County will not be



responsible for any oral instructions nor for any written materials provided by any County personnel that are not also posted on the above website.

6.1.7 Explanation to Proposers

Any explanation desired by a respondent regarding the meaning or interpretation of the RFSQ must be directed in writing exclusively to the County. The only method of delivering written questions is by e-mail pursuant to Sections 2.3 and 2.4 of this RFSQ. Telephone calls will not be accepted. In no event will the County be responsible for ensuring that inquiries by prospective respondents have been received by the County. Respondents should not attempt to contact any other County personnel about this RFSQ. Oral explanations or instructions will not bind the County. Any explanation concerning this RFSQ will be provided to all prospective respondents through posting on the County's website at: www.sdcre.com in the form of an addendum to this RFSQ. No response will be provided to questions received after the deadline stated in this RFSQ unless the deadline is modified by the County.

6.1.8 Debrief and Review of Contract Files

When a respondent has been notified by the County that its SOQ is no longer being considered, the respondent may request a "debriefing" from the County on the findings about that one SOQ (with no comparative information about SOQ submitted by other respondents). After the agreement contemplated by this RFSQ is executed, any interested party may make an appointment to review the SOQ and any other releasable documents.

Copies of any documents desired by the reviewer will be prepared at the requestor's expense in accordance with the State Public Records Act and current County rates for providing copies.

6.1.9 News Releases

Respondents shall not issue any news release pertaining to this RFSQ without prior written approval of the County, which may be withheld in County's sole discretion. A minimum of six (6) business days' notice is required for approval.

6.1.10 Claims Against the County

Neither respondents nor any representatives or agents of a respondent shall have any claims against the County or any of its elected officials, agents, or employees arising out of or relating to this RFSQ or these procedures (other than those arising under an executed agreement with respondent in accordance with the terms of the agreement).

6.1.11 Employment Offers

Until the agreement contemplated by this RFSQ is approved, respondents shall not, directly or indirectly, solicit any employee of the County to leave the County's employ in order to accept employment with the respondent, its affiliates, actual or prospective contractors, or any person acting in concert with the respondent, without prior written approval of the County. This paragraph does not prevent the employment by a respondent of a County employee who has initiated contact with the respondent.



6.2 Cancellation of RFSQ

The County reserves the right to cancel this RFSQ, in part or its entirety, at any time without prior notice and makes no representation that any agreement will be awarded to any respondent. Additionally, the County expressly reserves the right to postpone opening responses to this RFSQ for its own convenience, and/or to waive any informality or irregularity in the responses received.

6.3 Conflict of Interest/Financial Disclosure

The respondent agrees to comply with all applicable federal, State and local conflict of interest laws. Additionally, principals and key personnel of each development team are required to make any disclosures required by County. All respondents and those development team members and entities identified in Appendix B.5 will be required to complete, sign and return Form E – Conflict of Interest Declarations located in Appendix B.5.

6.4 Protest Procedure

County Board of Supervisors Policy A-97 shall apply to all protests, except that (i) “Director” means the Director, Department of General Services, (ii) “Contracting Officer” means the person listed in Section 2.3 of the RFSQ, and (iii) “Contracting Office” means the address listed on Section 2.3 of the RFSQ. All protests shall be made in writing and shall be filed with the Contracting Officer.

Copies of the Board Policy are available from the Clerk of the Board, 1600 Pacific Highway, Room 402, San Diego, California 92101, or on the County’s web site at <http://www.SanDiegoCounty.gov/> under the Clerk of the Board’s web page.

6.5 Reserved

6.6 Firms Associated with Project

- The County has identified the following firms as providing consulting services for this project.
 - RSG, Inc.
 - CTE, Inc.

The firms noted above have been associated with this project and are provided for informational purposes only. This information is not intended to be relied on for purposes of compliance with any conflict of interest rules or applicable laws or regulations affecting this project. The proposer is solely responsible for due diligence in identifying and avoiding all potential conflicts of interest related to contracting for, and construction of, this project.

Because these firms or individuals have previously been involved in the project, it is highly likely that their participation with the development team could result in an impermissible conflict of interest and prevent the development team from participating in the subsequent RFP. Additionally, because this list may not be exclusive, please ensure that your participants in the development have not provided design and/or consulting services for this project.



7.0 Appendices

The following lists of appendices are incorporated either directly within this document or available for download at: www.sdcre.com .

Appendix A – Site Specific Documents and Title Report

Appendix B – Statement of Qualifications (“SOQ”) forms



Appendix A – Site Specific Documents

Appendix A.1 – Site Map

Appendix A.2 – Preliminary Title Report

Appendix A.3 – Reserved



Appendix B – Statement of Qualifications Forms

Appendix B contains forms necessary to complete the respondent’s SOQ and are required to be submitted as part of the response to this RFSQ in accordance with Section 4. Microsoft Word and Excel version of the forms (where applicable) are available at: <http://www.sdcre.com>.

Appendix B.1 – Form A – Indemnification Agreement

Form A shall be completed, signed and returned with the SOQ package. Fill in all necessary information in order to complete Form A

Form A in Word format, is available at: <http://www.sdcre.com> and shall be used to complete Form A. The County will not accept SOQ packages without Form A, if respondent is submitting a confidential/proprietary exhibit, or packages that include Form A that have been amended or altered.

Appendix B.2 – Form B – Transmittal Letter

Form B shall be used to complete the Transmittal Letter as required in Section 4.3 of this RFSQ. Fill in all necessary information in order to complete Form B.

Form B, in Word format, is available at: <http://www.sdcre.com> and shall be used to complete Form B. Do not include the instruction page in the SOQ package.

Appendix B.3 – Form C – Information Regarding the Respondent, Team Members, and Financially Responsible Parties

Form C shall be used to complete the respondent Team Summary as required in Section 4.5 as well as Litigation and Bankruptcy History as required in Section 4.11 of this RFSQ. Fill in all necessary information in order to complete Form C.

Form C, in Word format, is available at: <http://www.sdcre.com> and shall be used to complete Form C. Do not include the instruction page in the SOQ package. A separate Form C should be completed for each entity and individual identified in Sections 4.5 & 4.11 respectively.

Appendix B.4 – Form D – Representations and Certifications

Form D shall be used to complete the Representation and Certifications as required in Section 4.5 of this RFSQ. Fill in all necessary information in order to complete Form D.

Form D, in PDF format, is available at: <http://www.sdcre.com> and shall be used to complete Form D. Do not include the instruction page in the SOQ package. A separate Form D should be completed for each entity and individual identified in Section 4.5.

Appendix B.5 – Form E – Conflict of Interest Declarations

Form E shall be used to complete the Conflict of Interest Declarations as required in Section 4.5 of this RFSQ. Fill in all necessary information in order to complete Form E.

Form E, in Word format, is available at: <http://www.sdcre.com> and shall be used to complete Form E. A separate Form E should be completed for each entity and individual identified in Section 4.5.



Appendix B.6 – Form F – Listing of Projects Completed in the Last 10 Years

Form F shall be used to provide a listing of projects that have been completed by the developer(s) in the last ten (10) years, as required in Section 4.6.2 of this RFSQ. Form F shall only be used to list completed projects. A separate Form F shall be provided for each entity and individuals listed in Section 4.5. Form F, in Excel format, is available at: <http://www.sdcre.com> and shall be used to complete Form F. Do not include the instruction page in the SOQ package.

Appendix B.7 – Form G – Listing of Projects Currently Under Construction

Form G shall be used to provide a listing of projects that are currently being developed by the respondent’s development team, as required in Section 4.6.1 of this RFSQ. Form G shall only be used to list projects currently being developed. A separate Form G shall be provided for each entity and individuals listed in Section 4.5.

Form G, in Excel format, is available at: <http://www.sdcre.com> and shall be used to complete Form G. Do not include the instruction page in the SOQ package.

Appendix B.8 – Form H – Listing of Projects Currently in the Development Review Process

Form H shall be used to provide a listing of respondent’s development team’s projects that are currently in the development review process but have not yet begun, as required in Section 4.10 of this RFSQ. Form H shall only be used to list projects that are in the development review process. A separate Form H shall be provided for each entity and individuals listed in Section 4.5.

Form H, in Excel format, is available at: <http://www.sdcre.com> and shall be used to complete Form H. Do not include the instruction page in the SOQ package.

