

SDSU Mission Valley
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**REQUEST FOR INFORMATION AND QUALIFICATIONS
SAN DIEGO STATE UNIVERSITY
MISSION VALLEY AFFORDABLE HOUSING PROJECT # 1**

Date: January 18, 2022
Contacts: Gina Jacobs, Associate Vice President, SDSU Mission Valley
Email: mvresidential@sdsu.edu

DEADLINE FOR QUESTIONS

February 3, 2022 at 2:00 p.m. PDT. Please submit all questions **in writing** by submitting them to mvresidential@sdsu.edu.

SUBMITTAL DUE DATE AND TIME

Submittals are due March 2, 2022, at 2:00 PM PDT. Submit one original submittal prior to the date and time specified to mvresidential@sdsu.edu. Development Teams shall respond by e-mail. Any questions about the submittal process can be directed to mvresidential@sdsu.edu.

San Diego State University (SDSU or University) assumes no responsibility for delay in submission of the response to this Request for Information and Qualifications (RFIQ) electronically. Submittal of responses by mail, personal delivery, courier service, or fax is not acceptable.

RFIQ REQUIREMENTS

Submissions that do not meet minimum requirements, content and quality standards of this RFIQ, or take exceptions, may be eliminated from further consideration.

San Diego State University encourages the participation of Disadvantaged, Minority-owned, and Women-owned Business Enterprises (D/M/W/BEs) and is committed to promote a diverse pool of firms.

Every effort will be made to ensure that all persons have equal access to future business opportunities with the University within the limits imposed by law or University policy. During the future Request for Proposal (RFP) process, each proposer shall be required to provide a Project specific equal employment opportunity policy as an appendix to its Technical Proposal submission.

This RFIQ does not constitute a call for bids, a final contract, or a legal commitment.

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❖ FORM NO. 1, QUALIFICATION CERTIFICATION FORM

SECTION 100: INTRODUCTION

101. PRE-QUALIFICATION CONFERENCE: SDSU will hold an initial informational pre-submission conference with potential development teams via Zoom Meeting on January 27, 2022 1 p.m. local San Diego time. Potential development teams are invited to request the Zoom Meeting link by emailing mvresidential@sdsu.edu with the following information:

- Name
- Title
- Company name
- Mailing address
- Phone number
- Email address

SDSU may hold additional joint informational meetings with developer teams at any time prior to the RFIQ submittal due date. At this time, all informational meetings are anticipated to be held virtually.

102. INTENT:

SDSU is requesting information and qualifications from qualified developers (Development Teams) that have demonstrated success in completing affordable multi-family housing projects, employing various public and private funding sources, and demonstrating compliance with applicable public jurisdictions. This RFIQ is intended to be a first step toward identifying qualified developers to plan, finance, construct, operate, and maintain an affordable housing development project (Affordable Housing Project #1 or the Project) on property owned by the Trustees of the California State University (CSU or CSU Board of Trustees) located at the SDSU Mission Valley Site (Mission Valley Site) in San Diego, California.

The proposed development opportunity will consist of one residential parcel totaling approximately 0.87 acres (Affordable Housing Site #1) and located on approximately one-half of the block bounded by Jacaranda to the north, Wildrose to the east, a future detention basin to the south, and Coffeeberry to the west. SDSU envisions that up to two (2) affordable housing projects, totaling 200-300 units, could be built on the entire 1.73-acre block. At a future date, SDSU anticipates entering into a ground lease for development of another affordable housing project (Affordable Housing Project #2) on the balance of the 1.73-acre block (Affordable Housing Site #2). As such, SDSU may use this Affordable Housing Project #1 RFIQ to select one Development Team to construct affordable housing on both Affordable Housing Site #1 and Affordable Housing Site #2. For purposes of this RFIQ, the Project is assumed to occupy approximately one-half of the block and result in the delivery of 100-150 affordable units.

Described in more detail in Section 103 below, Affordable Housing Site #1 is owned by CSU, and development rights will be conveyed to the selected Development Team in the form of a ground lease. See Section 300 Development Requirements for further details.

Qualified Development Teams meeting the RFIQ qualifications and demonstrating the ability to design, build, and manage affordable housing are encouraged to submit responses. Development Teams under this RFIQ may include one entity or a team of several entities, including any of the following: affordable

housing developers, joint ventures, resident services providers, and/or other service agencies. Development Teams that include several entities must identify a lead entity which has demonstrated experience and capacity in the development and management of affordable housing and must have successfully completed affordable projects of similar size and complexity as the proposed Project within the past five (5) years within San Diego County or in the State of California to be eligible to submit a proposal.

As envisioned in SDSU's Master Plan for the Mission Valley Site (Master Plan), SDSU seeks to transform a 166-acre site into a vibrant mixed-use development consisting of multiple public and private projects, including a 35,000-seat multi-use stadium (under construction), more than 80 acres of parks and open space, up to 4,600 residential units, 1.6 million square feet of office and innovation district uses, a 400-room hotel conference center, and 95,000 square feet of retail at full buildout.

The Mission Valley Site is anticipated to be subdivided into 34 public and private development parcels, of which 18 are identified for private residential uses, up to 15 for office and innovation district uses, and one for hospitality use, with neighborhood-serving retail to be distributed across uses. SDSU is undertaking a concurrent RFIQ for a 100% market-rate residential project (Residential and Retail Project #1), located on a different residential parcel and completely separate from the RFIQ for this Project. Residential and Retail Project #1 is specifically geared toward meeting existing and anticipated market demand for housing in Mission Valley and providing a neighborhood-serving retail anchor tenant. Based on a preliminary design concept under consideration by SDSU, it is anticipated that Residential and Retail Project #1 would support approximately 450 market-rate residential units and 30,000 square feet of retail.

Details regarding the Master Plan and related background documents can be found in the Residential and Retail Project #1 RFIQ here:

https://drive.google.com/file/d/1kVcIJQ_KELbDHxSha6aLSePHKAnGvXDT/view?usp=sharing

This Project is the first in a series of affordable housing development opportunities to be offered at the Mission Valley Site under a public-private partnership (P3) model, whereby the selected Development Team will enter into long-term ground leases for individual parcels and assume responsibility for designing, constructing, financing, operating, and maintaining development projects consistent with affordable housing use(s) as specified in the Master Plan.

Various separate projects at the Mission Valley Site are currently underway. Demolition, grading, utilities, and other site improvements are scheduled to be completed by Fall 2022. Additional site improvements, including the River Park, are scheduled to be completed in 2023.

SDSU aims to establish a sustainable, walkable, and transit-oriented mixed-use development with open space and recreation areas benefiting the entire Mission Valley community, and SDSU students, faculty, residents, and businesses.

After completion of the RFIQ phase, the proposal process will consist of a future RFP that will seek specific submissions for programming, design, financing, construction, as well as marketing, maintenance, and operation of this Project. A sample ground lease agreement will be provided at the future RFP stage. Development Teams will have the opportunity to provide comments regarding the ground lease at the time of the submittal of proposals in the future RFP process. Please note that performance security requirements

will be included in the sample ground lease agreement.

As part of this RFIQ, SDSU may select Development Teams to participate in an interview to discuss their qualifications, vision, and approach. The Development Teams selected from the RFIQ will be invited to participate in the future RFP stage.

103. BACKGROUND:

On August 13, 2020, CSU purchased the Mission Valley Site from the City of San Diego. A summary of the key Purchase and Sale Agreement (PSA) terms is available at: <https://missionvalley.sdsu.edu/purchase-and-sale-agreement>. The final Environmental Impact Report (EIR) for the Master Plan was certified in January 2020. The final EIR is available at: <https://missionvalley.sdsu.edu/community-engagement>.

The following projects from the Master Plan are being executed as Public Works projects:

1. Approximately 80 acres of park and open space, including a 34-acre River Park located on City-owned land along the southern boundary of the Mission Valley Site. The park will include active and passive recreation areas.
2. A multi-purpose Stadium to accommodate 35,000 attendees and support collegiate football and bowl games, professional and collegiate soccer, concerts, and other university, community, and corporate events.
3. Demolition of the existing stadium, grading to address 100-year flood plain requirements, and installation/relocation of site infrastructure, including roads and utilities necessary to support the stadium.

Initial construction on the above-referenced University-financed projects started in August 2020. The stadium is expected to be completed in September 2022, with all rough-graded individual parcels completed by Fall 2022, and the River Park and other related site improvements completed by 2023.

On November 18, 2020, the CSU Board of Trustees approved the concept of public-private partnerships and release of Requests for Information (RFIs), RFQs, and RFPs for the following projects:

1. A 1.6 million gross square foot research and innovation district, consisting of up to 15 public and private projects, containing commercial, technology, and office space. These projects will allow for new partnerships between SDSU, public entities, and private companies utilizing the newly developed facilities, and will provide opportunities for student internships, create an incubator for new and innovative business and academic uses, and enhance regional economic development. It is estimated that 13 of these projects will be located south of the new multi-purpose stadium and two of these projects will be located to the east of the new multi-purpose stadium. Approximately 5,000 garage parking spaces will serve the innovation district projects.
2. Up to 4,600 private residential units, consisting of up to 18 private projects, located on the east side of the Mission Valley Site. In accordance with the PSA with the City of San Diego, ten percent (10%) of the units (or up to 460 units) will be income-qualified affordable housing leased to

individuals or families at an average household income level of 60% of Area Median Income (AMI). The residential projects at the Mission Valley Site will provide much-needed market-rate and affordable housing for the larger San Diego community. SDSU's current plan is to phase up to 4,600 private housing units, including up to 460 affordable units, over the next 10 to 15 years, with current market projections showing a demand of over 500 additional private market-rate housing units per year at the Mission Valley Site. This corresponds to the projected delivery of two private market-rate residential pads per year and represents sufficient demand to complete all residential developments at the Mission Valley Site in approximately 10 years. All private residential projects will be constructed pursuant to long-term ground leases.

3. Up to a 400-room hotel project with approximately 40,000 square feet of conference space, up to 70 residential units above the hotel, and approximately 425 parking stalls, will be constructed pursuant to a long-term ground lease with a private developer at fair market value.
4. Up to 95,000 square feet of retail space located within the various public and private projects. These retail uses will serve stadium events, and the daily needs of employees, students, and residents, in addition to the greater Mission Valley community, through various buildings, facilities, and services.

104. THE MISSION VALLEY SITE AND THE PROJECT:

A. Overview

SDSU is one of 23 campuses within the CSU system, which is governed by the CSU Board of Trustees. SDSU's existing 380-acre campus is in southwestern San Diego County in the City of San Diego, approximately 2.5 miles from the Mission Valley Site.

In 2020, the CSU purchased 135 acres at the Mission Valley Site from the City of San Diego. The Mission Valley Site is in a developed area surrounded by major freeways, roadways, existing development, and the San Diego River and is served by the Metropolitan Transit System's (MTS) Stadium Station. This transit line provides service to Mission Valley, Downtown, South Bay, and East County. Higher-density multi-family residential land uses are located to the northwest, southwest, and east, across I-15. To the north are undeveloped hillsides and single-family residences. To the west are office and large commercial retail uses. Additional office uses and I-8 are located south of the San Diego River.

B. Overview of the Opportunity

The Project will consist of one residential parcel totaling approximately 0.87 acres and located on one-half of the block bounded by Jacaranda to the north, Wildrose to the east, a future detention basin to the south, and Coffeeberry to the west. The market-rate Residential and Retail Project #1 will be located along Innovation Parkway, due west from the Affordable Housing Site #1. It is anticipated that Residential and Retail Project #1 would support approximately 450 market-rate residential units and 30,000 square feet of neighborhood-serving retail space with an anchor tenant, currently envisioned to include a grocery store. An existing MTS Stadium Trolley Station located on the southern portion of the Mission Valley Site is less than 0.33 miles from the Affordable Housing Site #1.

An aerial parcel map showing the Mission Valley Site and Affordable Housing Site #1 are provided in Appendix 1.

The Project will be a standalone project on the Mission Valley Site. It is anticipated that the Project could offer approximately 100-150 affordable residential units. The total Project size will be determined based on preliminary design concepts undertaken by the Development Teams during the RFP stage and negotiations with SDSU.

The University will ground lease the Affordable Housing Site #1 directly to the selected Development Team. The Project is independent of the market-rate project.

At a future date, SDSU anticipates executing a ground lease for development of another affordable housing development (Affordable Housing Development #2) on the balance of the 1.73-acre block (Affordable Housing Site #2). As such, SDSU may use this Project RFIQ to select one Development Team to construct affordable housing on both Affordable Housing Site #1 and Affordable Housing Site #2. For purposes of this RFIQ, the Project is assumed to occupy approximately one-half of the block and result in the delivery of 100-150 affordable units.

As outlined in Attachment 22 to the PSA (<https://missionvalley.sdsu.edu/purchase-and-sale-agreement>), at least ten percent (10%) of all residences constructed at the Mission Valley Site must be affordable to households earning, on average, 60% of AMI. SDSU is considering a range of approaches to facilitate development of the affordable units required under the PSA, and additional information about SDSU's preferred approach will be included in the future RFP. The approaches under consideration include standalone tax credit projects at 80% AMI and below, mixed-income developments that incorporate affordable units up to 120% AMI, and/or a combination of the two. The required affordable units must be built on-site and a covenant requiring that affordable units be income-restricted for at least 55 years will be recorded against the affordable housing projects. The covenant will, among other things, require regular monitoring and compliance checks to ensure that occupants always meet income eligibility requirements.

SDSU is undertaking a concurrent, and separate, RFIQ for Residential and Retail Project #1. This market-rate project will be located directly west of the Project. The selected market-rate development partner may be subject to an affordable housing in-lieu fee for the costs of fulfilling the affordable housing requirements. Any such fee will be further defined as part of the future RFP process for Residential and Retail Project #1.

[End of Section 100]

SECTION 200: RFIQ SCHEDULE

SCHEDULE FOR RFIQ STAGE:

The following represents the current schedule for the RFIQ for this Project. Although SDSU intends to adhere to this schedule, the schedule is subject to modification at any time at SDSU's sole discretion. Respondents will be notified of any changes in the schedule via e-mail.

Release of RFIQ	January 14, 2022
Pre-qualifications Conference	January 27, 2022 1 p.m.
Deadline for Receipt of Questions (2:00 p.m.)	February 3, 2022
SDSU to Respond to Question (5 p.m.)	February 11, 2022
Deadline for Receipt of Information and Qualifications Packages (2:00 p.m.)	Wed. March 2, 2022
Interview Date (if necessary)	Week of March 7, 2022
Shortlist Finalists Announcement	April 2022
Future RFP Released to Shortlist Finalists	May 2022

NOTE: The RFIQ schedule of dates may be adjusted via Addendum.

[End of Section 200]

SECTION 300: PROJECT OBJECTIVES

A. Objectives for the Mission Valley Site

The following objectives have been defined for the development of the Mission Valley Site and the private residential projects.

- Provide a mix of housing options, responsive to existing and projected market demand.
- Provide retail amenities with adequate parking to serve neighborhood residents, businesses, and visitors. Retail uses will be situated along Innovation Parkway and are not a part of this Project.
- Maximize fair market value ground lease revenue to the University from P3 projects to reimburse the University for all costs and public funds associated with each private project.

B. Role of Affordable Housing Development Team

Private sector affordable housing Development Teams will be the most effective method to implement this Project at the Mission Valley Site. The selected Development Team will help envision an approach to designing, financing, implementing, operating, and maintaining the Project that will enable SDSU to fulfill its affordable housing obligations under the PSA while remaining compatible with the Master Plan.

The private Development Team selected from this process will undertake the following roles:

- Based on prior affordable housing development expertise, identify the preferred development program for the Project.
- Develop site plans, including supporting utility infrastructure, consistent with the vision of the Mission Valley Site.
- Develop an infrastructure plan and private funding for surrounding streets, including utilities, as well as any off-site needs, all of which will be further described in future RFP documents.
- Create a financial strategy to deliver the Project in the most cost-effective manner.
- Work with SDSU to secure Project approvals and schematic design from the CSU Board of Trustees.
- Work with SDSU to finalize key financial and commercial terms for a ground lease.
- Participate in the long-term management of shared infrastructure and amenities provided at the Mission Valley Site.
- Address other requirements described in this RFIQ.

C. Role of CSU and SDSU

CSU's and SDSU's primary role will be as the ground lessor. The Development Team will be solely responsible for all financing, construction, design, and operation of the Project at its own cost, including all necessary grading, infrastructure, or utility work.

SDSU's primary oversight during design and construction will be limited to coordination among individual developers, review and approval of schematic designs (to be submitted as part of the

future RFP process), issuance of building permits, and ensuring compliance with all terms and conditions set forth in the ground lease and related documents.

SDSU will take an active, ongoing role in facilitating overall long-term site management to ensure proper funding and maintenance of shared use amenities and infrastructure, such as parks and streetscapes, and compliance with all terms and conditions of the ground lease and related documents. Each Development Team will be responsible for paying its fair share of these costs so that all public funds related to the Project are reimbursed to the CSU and SDSU.

SECTION 301: PROJECT REQUIREMENTS

The Project must advance the objectives described above in Section 300. It is anticipated that future proposals for the Project could include, but not be limited to, family housing, senior housing, live/work units, micro-units, and/or other building configurations or target populations. The Project should recognize the transit-oriented nature of the Mission Valley Site and EIR commitments related to parking ratio maximums for residential projects. The Mission Valley Site is directly served by the San Diego Metropolitan Transit System and the Affordable Housing Site #1 is located less than one-half mile from the existing Stadium Station.

A. California Environmental Quality Act (CEQA) Requirements and Mitigations

The University has prepared an EIR which was certified by the CSU Board of Trustees in January 2020. The EIR examined the entire Site, including all individual projects (whether private or public). At this time, it is anticipated that no further CEQA review will be required prior to each project implementation. Each project developer will be required to conform with all environmental project design features and mitigation measures noted in the EIR, which can be found at website: missionvalley.sdsu.edu. Various mitigation measures are required, which will be the responsibility of the selected developer(s) to fund and implement, including but not limited to:

Air Quality, Energy, and Greenhouse Gas Emissions

- Construction Emissions Minimization
- Dust Mitigation
- Prohibition on Residential Hearths
- Electric Requirement for Building Heating and Cooling (HVAC) and Water Heating Systems
- Use of Solar Photovoltaic Panels
- EV Ready Parking/EV Charging
- Leadership in Energy and Environmental Design (LEED) Version 4 Silver or better
- Water Reclamation for Landscape Irrigation
- Adaptive Lighting Controls
- Compliance with the City of San Diego Climate Action Plan (CAP) Checklist

Hazards and Hazardous Materials

- Hazardous Materials Abatement
- Vapor Mitigation
- Emergency Response and Evacuation Planning

- Noise Mitigation
- Vibration Monitoring

Traffic and Transportation

- Construction Traffic Management
- Implementation of Relevant Transportation Demand Management Program Strategies

A summary of the Mitigation and Monitoring Reporting Program is available at website: [link](#).

B. Planning and Legal Requirements

It is the Development Team's responsibility to comply with all applicable federal, state, and local laws and regulations, and CSU regulations and policies.

C. Application of Public Works Law

Although the Project will be financed, designed, constructed, and operated wholly at the cost of the affordable housing developer, the Project may be subject to California's Public Work Laws (Cal. Lab. Code § 1720 et seq.). Prospective developers are hereby apprised of their obligation to become familiar with the requirements of the Public Works Law, including, but not limited to, those relating to paying prevailing wages, posting certain notices, and furnishing certain records to the Department of Industrial Relations on request. The University will determine whether the Public Works Law applies to the Project prior to the future RFP.

D. Additional Labor Requirements

SDSU has entered into a Memorandum of Understanding (MOU) with the Southwest Regional Council of Carpenters (Carpenters Union) which includes the following terms which solely apply to the trades represented by the Carpenters Union. Similar terms may also apply to other trade groups/unions if SDSU enters into future similar agreements with similar terms. SDSU will notify potential bidders of all such MOUs in the future RFP.

- The Development Team will be required to seek bids containing an enforceable commitment that all contractors and subcontractors performing work on the Project will require payment of prevailing wage.
- The Development Team and/or their general contractor awarded contracts for construction of the Project will be required to only enter into contracts for construction related work with contractors and subcontractors that will or have entered into agreements which enable those contractors and subcontractors to utilize registered apprentices from or enroll and hire apprentices into a local state certified apprenticeship program. The Development Team and/or their general contractors shall require the same of all contractors or subcontractors that are awarded work on the Project. Any contractor or subcontractor found to be in violation of these contractual requirements will be considered to be in breach and subject to removal from the project.

- The Development Team and/or their general contractors awarded contracts for construction of the Project will be required to create and disclose to SDSU a list of all bidders, including all subcontractor bidders. Such list shall note whether such contractor or subcontractor has been required to pay any sum of money, either as a penalty or in settlement, to any state or federal agency for wage and hour violations or other labor standard violations. To the extent that such information is publicly known, or offered by such contractor or subcontractor, the list shall also reflect the monetary amount of such penalties or settlement amounts, and any other relevant information as to the types, and number of such violations.

E. Seismic Safety

When a private developer constructs a building on land owned or controlled by the CSU, the Project is required to be peer reviewed in accordance with the CSU Seismic Requirements available at the following link: https://www2.calstate.edu/csu-system/doing-business-with-the-csu/capital-planning-design-construction/Documents/CSU_Seismic_Requirements.pdf.

F. LEED Certification

The Project must be constructed in a manner that meets or exceeds LEED-certified standard of Version 4 Silver in accordance with the EIR. Development Teams who wish to implement strategies above and beyond LEED Silver will be awarded bonus points during the future RFP stage.

G. SDSU Design Review

Schematic design will be reviewed and approved by SDSU and subsequently the CSU Board of Trustees, in accordance with the terms and conditions of the final ground lease.

H. Land Use and Permitting

University owned land is not subject to local, regional, or municipal land use regulations and functions when the University is acting in its sovereign and autonomous government capacity under Article IX of the California Constitution, as building official with full power and authority to authorize, approve, permit, and inspect the design, alteration, improvement, and construction of buildings and structures, including design review, building permit issuance, construction inspections, permit sign-off, fire and life safety inspections, final inspections, and issuance of certificate of occupancy. Issuance of building permits will be dependent upon provision of appropriate design submittals. The University complies with Title 24 California Building Standards Code, Parts 1-12 and all amendments (CBC). Compliance with all state, local and CSU codes – to the extent applicable – will be the developer’s responsibility. Accordingly, the developer will be responsible for all costs associated with meeting all applicable governmental regulations for development of the Project.

I. Soils

The Affordable Housing Site #1 is being offered on an as-is basis. There are no known contaminated soils in the area resulting from past activities. A hazardous materials records review was conducted in 2019 as part of the Mission Valley Site purchase with documentation regarding soil conditions available at this website: <https://missionvalley.sdsu.edu/documents/public-review-draft-eir>

J. Utility Infrastructure

The Project will require easements and utility connections to municipal and SDSU-owned public utility systems. SDSU expects the selected Development Team to determine the most efficient approach for Project utility connections and coordinate with the appropriate entities to implement.

K. Residential Parking

The EIR imposes an overall maximum parking supply on the Mission Valley Site of 1.23 spaces per dwelling unit. Preference may be given to Development Teams that propose less than the maximum 1.23 spaces per dwelling unit.

[End of Section 300]

SECTION 400: RFIQ SUBMISSION REQUIREMENTS

All Statement of Qualifications (SOQs) shall include information in the format described below and shall be **limited to 25 pages** (excluding the table of contents, information requested in Item F below, and Form 1) with a minimum font size of 11 points including graphics. Page numbers should be included on all pages that count toward the 25-page limit and should not appear on pages that do not count toward the 25-page limit. Development Teams should submit information in appropriate detail on each of the items described below to allow adequate review and evaluation. The format for the submission of information consists of the following elements:

- A. Cover letter (not to exceed 3 pages)
- B. Table of Contents
- C. Identification of Development Team
- D. Development Team Qualifications
- E. Development Vision
- F. Financial Capability
- G. Form 1

The Development Team is completely responsible for ensuring that the SOQ is submitted properly and received by SDSU. SOQs submitted by mail will not be accepted. The SOQs will remain confidential until the evaluation and selection process is complete. Following selection of finalists, all SOQs will become a matter of public record. Respondents may request truly confidential or legally proprietary information be redacted from any response to a public records request, if any, and SDSU will honor such requests to the extent allowed under the California Public Records Act.

The following information shall be provided in the Statement of Qualifications:

A. Cover Letter

The cover letter should include the full title of the RFIQ, submittal date, principal contact, address, telephone number, email address, and brief narrative outlining proposer's interest, capabilities, and identify any concerns about meeting any of the requirements in this RFIQ. The letter shall be signed by a principal or officer authorized to represent and commit on behalf of the firms in the Development Team. The letter must acknowledge that any development on the Affordable Housing Site #1 will be subject to a non-subordinated long-term ground lease without option to purchase.

B. Table of Contents

A table of contents shall list corresponding headings and pages to allow for easy reference by the reviewers.

C. Identification of Development Team

Identify members of the Development Team and provide a brief description of each team member's role, including the following:

1. Principals involved in the Project including relevant contact information.
2. Resumes of key team members that include number of years in business and years with the firm.
3. A description of each team member's proposed role and relevant experience with projects of a similar nature and size.
4. A detailed organizational chart.

D. Development Team Qualifications

Of particular interest is the Development Team's track record of assembling and managing a team capable of fulfilling the requirements of the Project (e.g., architects, landscape architects, urban designers, planners, engineers, builders, property managers, etc.). Provide at least three (3) relevant examples of affordable housing projects of at least fifty (50) housing units each. The projects must be 100% affordable at an average 60% AMI or less and completed within the last five (5) years.

List and describe the Development Team's experience in developing and managing the three (3) previous affordable developments with emphasis on the following:

1. The precise role that the Development Team and principals played in each project's development.
2. Project descriptions, including dates of commencement and completion, location, concept, target population, affordability levels, and total development budget.
3. Financial structure of the project, including: (a) amount and source of equity and debt financing, as well as the name of the entities providing the equity and debt; (b) amounts and sources of other public agency loans and grants; and/or (c) contribution of land from a public agency or master developer.
4. Architecture, landscape design, and photographs of developments.
5. Length of time to complete the developments.
6. Local public agency involvement, if any, including Disposition and Development Agreements, affordable housing loans, ground leases or land contribution, and/or other P3 arrangements.
7. Narrative describing approach and familiarity interfacing with public design review boards.
8. Names, title, company, and telephone number of public agency or master developer references for each project discussed.

E. Financial Capability

As noted above, for each of the principal parties comprising the proposed Development Team, please provide:

1. Three (3) years of audited financial statements for each of the principal parties and a list and the status of any and all pending litigation against the principal parties, their subsidiaries, or

affiliates. SDSU reserves the right to inspect the books and records of each prospective Development Team. If audited financial statements are not available, submit Independent Account's Review Reports prepared by a Certified Public Accountant (CPA) wherein the CPA confirms that they have reviewed the financial statement and found no material modifications that should be made to the statement for the statement to be in conformity with accounting principles generally accepted in the U.S.

2. A statement indicating whether a voluntary or involuntary petition under Federal bankruptcy law has ever been filed with respect to the principal parties of the development team within the past ten years. If so, state the date, case number, court jurisdiction and amount of liabilities and assets.
3. Provide narrative that highlights expertise with securing competitive Federal and State funding sources and identify existing relationships with tax credit investors.

F. Development Vision

Provide a narrative description of the Development Team's vision for the Project and its relationship to the University's objectives. The vision for the Affordable Housing Site #1 should include:

1. A concept for the Affordable Housing Site #1 identifying proposed type of housing units to be constructed, target population to be served, and proposed income levels, and describing how these parameters are responsive to anticipated affordable housing needs in Mission Valley and the surrounding market area.
2. Brief narrative describing approach to implementation of the development concept, knowledge of permitting process, and construction timeframes.
3. Identification of key opportunities and challenges with respect to designing, financing, and developing affordable housing on the Affordable Housing Site #1.
4. Narrative describing the Development Team's track record with the broad range of funding and financing sources necessary to fund affordable housing developments, including:
 - a. Relationships with construction and permanent lenders.
 - b. Relationships with tax credit equity investors.
 - c. Successful awards from the California Tax Credit Allocation Committee (CTCAC), the California Debt Limit Allocation Committee (CDLAC), and other various competitive Federal and State affordable housing programs.
5. Any additional strategies that the Development Team intends to utilize to minimize the remaining gap funding required after the above-referenced funding and financing sources have been secured.

G. Form No. 1

Complete and sign Qualification and Certification Form No. 1.

[End of Section 400]

SECTION 500: RESPONSE REQUIREMENTS

Firms responding to this RFIQ must submit a complete original submittal on or before the date and time set forth herein. The submittal must be organized and formatted in accordance with the requirements outlined in Section 400. Firms shall respond by electronic file upload only. **SUBMISSIONS WILL NOT BE ACCEPTED IF SUBMITTED THROUGH ANY OTHER MEANS** (the University will not accept submissions via mail, personal delivery, or courier service). Mistakes or delays in the electronic submission of documents are entirely the responsibility of the Firm. **LATE RESPONSES WILL NOT BE ACCEPTED.**

Statement of Qualifications:

The RFIQ qualifications response document shall be submitted as two electronic files in .pdf format as follows:

1. The first file shall contain the information requested in Items A through D and F as outlined in Section 400 and shall be marked as “Statement of Qualifications Submittal.”
2. The second file shall contain the information requested in Item E as outlined in Section 400 and shall be marked “Development Team Financial Capability.”

Both files shall also include a title page (exempt from the page limit requirement) with the following:

- The Name of Development Team and Address
- Attn: Gina Jacobs, Associate Vice President, SDSU Mission Valley
- RFIQ for Mission Valley Affordable Housing Project #1
- The RFIQ Due Date and Time

Pages may be scanned or converted to .pdf from other file formats. Searchable formats are preferred.

All forms requiring a signature shall be signed by an authorized officer or employee of the Development Team. The name, title, mailing address, email address, and phone number of the authorized officer or employee shall be included. Electronic signatures are acceptable.

[End of Section 500]

SECTION 600: EVALUATION CRITERIA AND PROCESS

RFIQ PROCESS OVERVIEW

The purpose of this RFIQ is for Development Teams to demonstrate, in a concise manner, their ability to finance, develop, maintain, and operate the Project. SDSU may modify this RFIQ, any of its key actions dates or any of its riders, prior to the date fixed for submission of SOQs by issuance of an Addendum.

If any ambiguity, conflict, discrepancy, omission or other error in the SOQ or any of its supporting documents becomes evident, please immediately notify the University contact of such error in writing and request clarification of the document. Modifications, if needed, will be made by Addendum.

Costs for responding to this RFIQ are entirely the responsibility of development teams and shall not be chargeable to SDSU.

While it is the intent of SDSU to proceed with this RFIQ, this RFIQ does not obligate SDSU to enter into a contract or other agreement. SDSU reserves the right to cancel this RFIQ at any time, for any reason or no reason. No obligation either expressed or implied exists on the part of SDSU to make an award or to pay any costs incurred in the preparation or submission of SOQs. Further, the University reserves the right to waive any minor irregularities that it feels are immaterial to this RFIQ. All decisions of the University are final.

SOQs become the property of SDSU. Information submitted in the SOQ becomes public property and may be subject to public records disclosure laws. SDSU reserves the right to make use of information or ideas contained in submittals. A digital copy of each SOQ will be retained in SDSU official files.

An evaluation team comprised of University personnel and appropriate external entities, as determined by the University, will review each SOQ submitted in response to this RFIQ to ascertain relative strengths and weaknesses based on the submission requirements described herein. SDSU may seek additional information from Development Teams and may also wish to conduct interviews and/or site visits to the Development Teams' prior projects as part of the selection process. Selection will be based on the completeness and quality of responses to the initial RFIQ, and subsequent presentations, particularly with respect to the criteria identified below.

Qualifications will be evaluated based on the following criteria:

1. Responsiveness to the RFIQ Submittal Requirements (10%)

Adherence to the stated page limitations, responsiveness to RFIQ organizational and content requirements, completeness and clarity of the information provided by the proposer.

2. Responsiveness of Development Vision (20%)

The quality of the Development Team's concept, including whether market demand and conditions justify the concept and the way the proposed Project meets the goals and objectives described in the Development Objectives and the Development Requirements sections of the RFIQ. The extent to which the Development Vision articulates an approach to obtaining construction and permanent financing for the proposed development (particularly on leased

land), knowledge to complete necessary critical path milestones, and soundness of the development and construction time frames. Architectural plans and renderings are not required in the submittal.

3. Development Team Qualifications (25%)

The following list represents the criteria as it relates to the Development Team's ability to plan, design, construct, and manage affordable housing projects as demonstrated in the SOQ:

- In the last five (5) years, the Development Team has developed three (3) comparable affordable housing projects, with not less than fifty (50) units per project.
- Demonstrated ability to successfully design and construct affordable housing developments.
- Demonstrated ability to operate and maintain completed affordable housing communities, including sustaining occupancy and maintaining site operations and character.
- The capacity and willingness to work cooperatively with the University in the design and development of projects, as well as the long-term management of projects.

4. Financial Capacity (45%)

The following list represents the criteria as it relates to the Development Team's ability to secure the necessary funding, including debt, equity, and public agency funding sources, to finance affordable housing projects as demonstrated in the SOQ:

- In the last five (5) years, the Development Team has demonstrated the ability to successfully finance at least three (3) comparable affordable housing developments;
- Demonstrated financial capacity to undertake the Project and provide any necessary guarantees to successfully complete the Project.
- In the last five (5) years, the Development Team has demonstrated the ability to attract leverage funds and qualify for other subsidized funding sources which may include, but are not limited to:
 - Low-Income Housing Tax Credits (LIHTC);
 - Tax-exempt bond financing;
 - Multi-family Housing Program (MHP);
 - Infill Infrastructure Grant (IIG);
 - Affordable Housing and Sustainable Communities (AHSC);
 - Affordable Housing Program (AHP);

- Other Federal, State, and/or local public agency funding; and/or
- Grants and other public and private sources of funds.

[End of Section 600]

QUALIFICATION CERTIFICATION FORM

NOTE: THIS PAGE MUST BE COMPLETED, SIGNED, AND RETURNED WITH YOUR SUBMITTAL

The undersigned certifies that to the best of his/her knowledge: (check one)

() There is no officer or employee of San Diego State University who has, or whose relative has, a substantial interest in any existing or future agreement subsequent to this Request for Information and Qualification.

() The names of any and all public officers or employees of San Diego State University who have, or whose relative has, a substantial interest in any existing or future agreement subsequent to this Request for Information and Qualification are identified by name as part of this submittal.

In compliance with this RFIQ for the Mission Valley Affordable Housing Project #1 and after carefully reviewing all the conditions imposed therein, the undersigned agrees to furnish information in accordance with the specifications and scope of the Project according to this submittal or as mutually agreed upon by subsequent negotiation, after a future RFP.

CERTIFICATION	
Signature	Typed Name and Title
Name of Company as Licensed	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership
Federal and State Tax ID Numbers	
Street Address	<div style="display: flex; justify-content: space-between;"> City State Zip </div>
Phone No. () -	Fax No. () -
Mobile No. () -	Email Address

APPENDIX 1

