

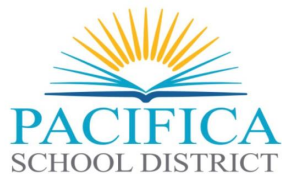
## Request for Qualifications

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### Workforce Housing Project for Pacifica School District Pacifica, California

Solicitation Issued: September 15, 2017  
Qualifications Due: November 1, 2017



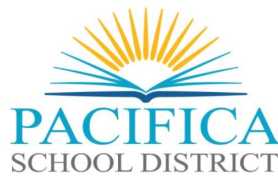


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- Location Map
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## 1. INTRODUCTION

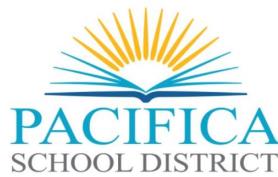
Pacifica School District (“District”) is soliciting statements of qualification, the initial step of a two-step selection process, for firms interested in providing Real Estate Development services for the development of an 11.1 acre site in the City of Pacifica. The selected respondent will be required to entitle a two-phase, sixty-five (65) unit workforce housing Project that will include associated ancillary facilities to be located at 930 Oddstad Blvd in Pacifica, California (“Project”). While the selected respondent will be expected to secure entitlements for the full scope of the Project, the respondent will construct only the first phase of the work which includes forty-five (45) dwelling units and ancillary facilities (“Phase One”).

The District serves approximately 3300 children, and includes one middle school, two K-5 schools, three K-8 schools and the Linda Mar Educational Center. The District is soliciting developers to support the District’s objective to provide affordable housing within the City of Pacifica to attract and retain the teachers and staff to best serve the community’s children.

This Request for Qualifications (“RFQ”), issued pursuant to Section 17250.25(b) of the California Education Code, seeks to identify developers qualified and interested in providing these services. Firms that respond to this RFQ, and who are determined by the District to be most qualified, may be deemed eligible and may be invited to offer proposals and/or interview for these services.

A limited list of respondents that the District, in consultation with its project consultant, Brookwood Advisors, determines to be best qualified will be asked to submit a Proposal during a Request for Proposal (“RFP”) phase of the Project. The RFP will require developers to provide information mandated by Section 17250.25(d) of the Education Code, including information related to the cost and schedule for the development of the Project, and more detailed information regarding the developer’s proposed team.

The District intends to develop the Project as a “design-build” project pursuant to Sections 17025.10, *et seq.*, of the California Education Code. The agreement with the Developer will utilize a bridging design and procurement process. The Developer’s services shall include overall development responsibilities incorporating Management of the CEQA process, project entitlements, design refinement and construction documentation, construction permitting and construction.



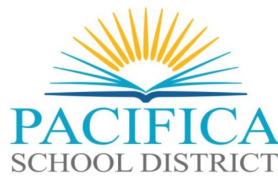
## **INTRODUCTION (Continued)**

Respondents deemed qualified through the RFQ process shall be provided Bridging Documentation describing the project design, the building programmatic requirements, and the project quality, materials and systems which together shall be incorporated into the RFP.

The selected finalist from the RFP (the “Developer”) process shall enter into a two-stage Development Management Agreement (“DMA”), which shall serve as the governing documents for the services to be provided for the Project. The First Stage Award is anticipated to last four months and includes the period from the contract execution thru the formal planning submittal, study session and confirmation by the Developer of the project schedule and costs. The Second Stage Award represents the authorization to proceed with the remainder of the Project Scope through the end of the Project. *(Refer to the Schedule in Section 4 for more detail.)*

Business terms, including the owner’s responsibilities and the Developer’s obligations, will be incorporated into and made a part of the DMA. The selected Developer will be asked to agree to such terms in response to the RFP.

All respondents are subject to instructions communicated in this document, and are advised to review the entire RFQ and follow instructions carefully. The District reserves the right to reject any or all statements of qualification, and to waive technicalities and informalities at its discretion. The Developer will be responsible for its own costs for the preparation of its response to the RFQ and RFP and contract negotiations.



## **2. GENERAL PROJECT INFORMATION**

### **A. Project Background**

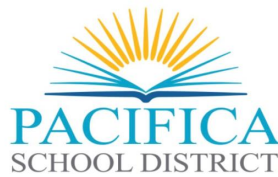
The District proposes, through the Project, to develop and provide high quality workforce rental housing to the District's teachers and staff. The District intends to offer below market rents to teachers and staff residing at the Project and the District expects the Project to assist in recruitment and retention of employees.

While not a party to the District's financing transactions, the Developer will assist the District in coordination of the District's Project financing methods, which may include, among other possible methods, the utilization of Certificates of Participation ("COPs") and predevelopment funding from the Housing Endowment and Regional Trust of San Mateo County ("HEART").

Developer will manage the design, entitlement, permitting and construction-related activities on a fixed-cost, turn-key basis. The Developer will not provide financing for the Project and will not participate as an equity partner. All development costs for the Project will be funded by the District via financial instruments that will be available to support project costs.

The Developer will be expected to facilitate the success of the Project through the relationship it develops (or currently maintains) with approving agencies and governing authorities, champion the Project through the appropriate and necessary community outreach, and manage the construction through start-up and completion of the Punch List. Developer will continue to address "start-up" concerns through the duration of the one-year Warranty Period. The District anticipates instituting an Owner Controlled Insurance Program ("OCIP") for the Project and the Developer and its subcontractors will be required to participate in the OCIP.

The Project, upon completion, shall be owned and managed by a non-profit entity created by the District ("Non-Profit Entity"). A third-party property management entity hired by the Non-Profit Entity will maintain, administer, operate and lease the Project on behalf of the District.



## **GENERAL PROJECT INFORMATION (Continued)**

The District intends to set rents at levels that cover all Project operating costs, principal and interest related to project financing, and the establishment of appropriate reserves. The District shall maintain ownership of the land and all improvements. In addition to the Bridging Documentation, the District shall provide a title search, topographical and boundary survey, a Phase 1 Environmental Report, geotechnical and utility information and a project timeline as a part of the RFP.

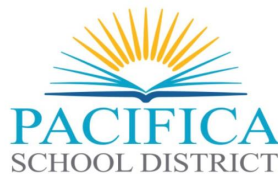
The District has retained legal counsel and will provide appropriate legal guidance in its interest for the Project. The District may provide additional special consultants and inspectors prior to or during construction, at its discretion.

### **B. Project Scope/District Need**

The Project has an overall estimated development cost through construction of Phase One of \$18,000,000 excluding municipal and agency fees, excluding Municipal and Agency Fees. The Project is located on a site that is 11.1 acres in size and located at the southeast corner of Oddstad Boulevard and Big Bend Drive, Pacifica, California. Phase One of the Project consists of the construction of approximately 45 apartment-style units consisting of 1BR/1BA, 2BR/2BA and 3BR/2BA units.

The housing shall be one and two-story buildings with surface parking and individual garages. Parking will average two spaces per unit plus additional parking for visitors.

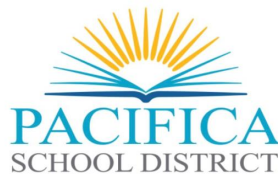
Included in Phase One of the Project scope will be inclusion of two soccer fields (currently located on the site). Also included will be parking for the two soccer fields. Project Scope to include necessary infrastructure for the development, including all necessary utilities.



### 3. SCOPE OF SERVICES

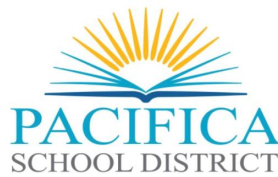
On behalf of the District, Developer will manage all Project design development and documentation in conformance with the Bridging Documents to be provided in the RFP. Further, Developer shall manage CEQA, planning approvals, community outreach, permitting and construction related activities. All services shall be provided on an open book and fully transparent basis. In this role, Developer will:

- A. Serve as the project manager on a day-to-day basis for the District for the entire scope related to the Project as described in this document. Developer may serve as the management entity for leasing and/or operations under a separate agreement, and at the discretion of the District.
- B. Manage, on behalf of the District, the overall project budget, including, but not limited to, the construction budget, FF&E budget, financing charges, soft costs and the development fees.
- C. Review with the District, and retain directly or on its behalf, the contractor, suppliers, engineers, architects, and other consultant and vendors necessary for the successful completion of the project.
- D. As appropriate, consult, coordinate and assist with managing the District's consultants, including, but not limited to, the following: legal, geotechnical, site environmental, traffic, CEQA, security, data/telecom, title officer, procurement specialist for the certificates of participation.
- E. Provide the following service providers, as needed for the successful completion of the Project: architectural, acoustical, structural, vertical transportation, mechanical, electrical, plumbing, fire protection, life safety, civil engineering, landscape, cost estimating, signage and graphics, lighting, parking equipment, LEED Consultant, signage and graphics, and waterproofing. This list is not meant to be complete or exhaustive--additional service providers may be necessary over the course of the Project and shall be retained by the Developer at the Developer's expense. The District shall retain the right to reasonably approve the use and hiring of any and all services and entities to be utilized on the Project.



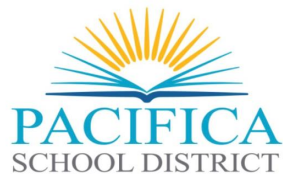
### **SCOPE OF SERVICES (Continued)**

- F. Meet with all agencies having approval authority over the Project, including, for example, the North County Fire Authority, the City of Pacifica's Planning, Building and Public Works Departments, and the North Coast County Water District, to identify Project-related issues and site-specific requirements. Subsequent meetings throughout the development process are anticipated to keep these agencies advised of Project developments to facilitate Project permitting.
- G. Hold project meetings as appropriate to the project schedule and phase of the Project. with the appropriate Project consultants. These meetings may be attended by either the District or a third party hired by the District.
- H. During the Construction Documentation phase, schedule regular Project meetings on a bi-weekly basis (if not more frequently). During the Construction phase, schedule weekly team meetings with the Contractor, Architect and other consultants as appropriate. These meetings will include attendance and oversight by either the District directly or a third party hired by the District. Project Meetings will be documented with the District, or District's representative, included on the distribution.
- I. Obtain all required governmental and agency permits needed for the entitlements and construction of the Project. The costs for all permits and fees necessary to entitle, permit the Project shall be excluded from the Developer's budget.
- J. Coordinate with and assist the District in preparing documentation and other necessary information for financial institutions, community groups, and governmental agencies.
- K. Provide general administration of the Project. This includes managing and reviewing requests for payment from the project consultants, the contracting entities, and other project vendors. Should a Change Order to the District be warranted, the Developer will prepare and present the change to the District for approval, and once approved, implement the change to the Project.
- L. Identify and manage the completion of Punch List Items and provide the City's Final Certificate of Occupancy for the Project.
- M. Provide all close-out documents including full record documents prepared and turned over to the District at the completion of the project for use by the District.



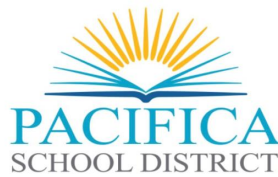
#### 4. PRELIMINARY PROJECT TIMELINE

- *September 15, 2017*  
Issuance of RFQ
- *November 1, 2017*  
RFQ Responses Due
- *December 1, 2017*  
Notification of Respondents Selected to Participate in the RFP Process
- *April 1, 2018*  
Issuance of RFP
- *May 15, 2018*  
RFP Responses Due
- *May 15 – August 1, 2018*  
Review of RFP Responses and Recommendation to Board; Notification of Selected Developer and Contract Execution
- *August 1 – December 1, 2018: First Stage Award*  
Submittal of Formal Planning Documents and Review. Design Refinement and Project Confirmation with Selected Developer to include formal project Submittal for Re-Zoning and General Plan Amendment, Community Outreach, Submittal for Technical Review by City staff and Presentation for the Planning Commission Study Session
- *December 1, 2018 and Beyond: Second Stage Award*  
Work subsequent to formal review and comment by City Technical Staff and Planning Commission Study Session
- *August 1, 2018 – October 1, 2019*  
Estimated Timeframe for EIR and Entitlements—overlapping with First Stage and Second Stage Awards
- *October 1, 2019 – April 1, 2020*  
Construction Documentation



### **PRELIMINARY PROJECT TIMELINE (Continued)**

- *April 1, 2020 – July 1, 2020*  
Building Permit
- *July 1, 2020 – September 1, 2021*  
Construction
- *September 1 – December 1, 2021*  
Move-in, Punch List and Close-out
- *September 1, 2021 – September 1, 2022*  
One Year Warranty Period



## **5. REQUIRED SUBMITTAL INFORMATION AND EVALUATION CRITERIA**

In the RFQ phase of the selection process, emphasis is on the respondent's directly relevant qualifications and experience with workforce housing, the respondent's financial stability, ability to undertake the proposed development project, experience with projects working with public entities, experience working as a development manager, experience with public funding mechanisms (for example, COPs), Type 5 multi-family residential experience and experience navigating and managing entitlements and knowledge of CEQA.

*Note: It is understood by the District that not every element of the above criteria may be satisfied by each respondent.*

Each response to the RFQ should include the following components:

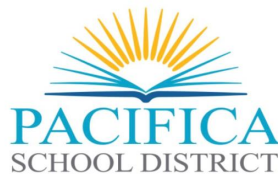
### **A. Cover Letter and Acceptance of RFQ Terms**

In the cover letter, please include description of Developer. Include Developer's name, street address, telephone number, and e-mail address. Identify the "team representative." (i.e., the person who is authorized to represent and negotiate on behalf of the development team and make legally binding commitments). Cover letter shall state the willingness to accept the process and project approach as outlined throughout this solicitation.

### **B. Development Team Description, Qualifications and Submittal Requirements**

Summarize the qualifications and experience of the Developer for the proposed development. The summary should provide evidence that the team's key personnel have appropriate experience and expertise to carry out the Project.

1. Organization chart of proposed Development Team and Role in the Project.
2. Corporate organizational documents for the Development Team
3. Resumes of Development Team members slated for the Project
4. Demonstrated ability to work with public sector clients

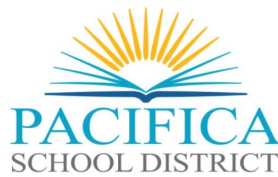


## **REQUIRED SUBMITTAL INFORMATION AND EVALUATION CRITERIA (Continued)**

5. Ability to manage the development of a Project utilizing innovative public financing. Currently, anticipated financing mechanisms include Certificates of Participation (COPs) and seed capital from HEART.
6. Listing of all relevant licenses, registrations, and credentials that the team members possess and a description of how such authorizations are adequate to carry out the Project.
7. Description and evidence of Development Team's ability to secure necessary payment and performance bonds and insurance.
8. Information concerning workers' compensation history and worker safety program and evidence of an acceptable safety record for the Development Team. (An "acceptable safety record" means that the Development Team's experience modification rate for the most recent three-year period is an average of 1.00 or less and its average total recordable injury or illness rate and average lost work rate for the most recent three-year period does not exceed the applicable statistical standards for its business category. See Education Code Section 17250.25(3)(G).
9. The information requested in this Section B shall be provided under penalty of perjury by the design build entity and its general partners or joint venture members, as required under Section 17250.25(b)(4)(A) of the California Education Code.

### **C. Relevant Development Experience**

Provide a description of not less than two, nor more than five, recently completed, cost effective multi-family housing projects of a similar nature developed or managed by individuals anticipated to participate on the development team. Such descriptions should provide evidence that the team members have the experience, competency, capability and capacity to complete projects of a similar size, scope, and complexity as the District's Project.



## **REQUIRED SUBMITTAL INFORMATION AND EVALUATION CRITERIA (Continued)**

For each project, please include the following:

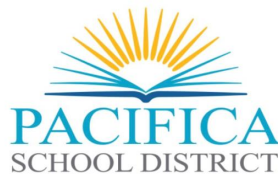
1. Project name, location, completion date, and development team members involved in the Project
2. Description of each development and a detailed explanation as to the relevance of the project to this Project, including, as appropriate, the approvals process, project density, development cost, project schedule, financing, etc.
3. Project photos including an aerial photo of the site, site plan and unit interiors
4. Indication of whether the project involved a business relationship with a public entity, and a description of the nature of any such relationship.
5. Relevant project references for each project discussed.

### **D. Financial Stability**

1. Developers submitting their qualifications must demonstrate evidence of their financial capacity and stability to carry out this Project.
2. Respondents should provide at least two references from a financial institution familiar with the respondent's financial condition. Financial statements for the most recent three calendar or fiscal years are also acceptable as evidence of financial stability.

*Note: During the RFP phase, Developers selected to respond will be required to provide audited/certified financial statements for the most recent five calendar or fiscal years.*

3. The District recognizes the sensitive nature of the financial information requested; therefore, this information may be submitted under separate cover and labeled "Confidential." All submittals are considered confidential until the District makes a selection, at which time the responses shall become public information and available to the public for review. However, if a respondent asserts this information is a trade secret, financial statement portions of each proposal will be treated as confidential and will not be available for public review at any time. In addition, confidential records may be returned to those not selected, if so requested.



## **REQUIRED SUBMITTAL INFORMATION AND EVALUATION CRITERIA (Continued)**

4. List and explain all litigation or disputes to which the respondent is a party that could result in a financial settlement having a materially adverse effect on the ability of the respondent to fulfill its obligations during the term of the Project.
5. Provide a statement detailing whether the Developer, or any of the Principals of the Developer have ever filed for bankruptcy or have had projects that have been foreclosed. If yes, please list the dates and circumstances.

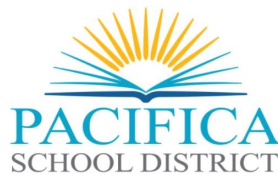
### **E. Risk Mitigation**

Respondents to this RFQ shall present suggestions and methodologies for consideration to structure the DMA and/or manage the development and construction process to minimize risk to both the Developer and the District. To the extent this alternative risk profile results in lower Project costs, the District may consider re-allocation of traditional risk models typically found in public sector procurement.

By way of example: how are the risks allocated between the District and Developer for unforeseen subsurface conditions, or risks such as material cost increases, labor strikes, etc, schedule slippage, or uncertainties around community sentiment in the approvals process.

### **F. Additional Letter(s) of Reference**

In addition to the letters of reference requested under Relevant Development Experience, respondents are requested to provide a minimum of one additional reference from a government official with direct responsibility for overseeing a previous entitlement process the developer managed.



## 6. QUESTIONS AND CORRESPONDENCE

All questions regarding the RFQ, the project site, and/or the process of selection are to be addressed in electronic format no later than October15 to:

Mr. John Hashizume, Director of Facilities  
Pacifica School District  
[jhashizume@pacificasd.org](mailto:jhashizume@pacificasd.org)

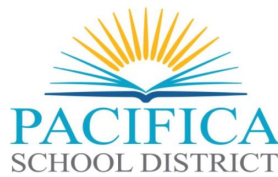
with an electronic copy to:

Mr. Ken Klebanoff, Senior Vice President  
Brookwood Advisors  
[kklebanoff@brookwoodgroup.com](mailto:kklebanoff@brookwoodgroup.com)

## 7. DEADLINE AND DELIVERY FOR STATEMENTS OF QUALIFICATIONS

Submittals are due by 5:00 p.m. on Monday, November 1, 2017, at the Pacifica School District, 375 Reina del Mar Avenue, Pacifica, CA 94044. Submit ten (10) 8.5" x 11" hard copies in an 11" X 17" manila envelope labeled "Pacifica School District Workforce Housing Project RFQ". Also, include electronic copies to this RFQ via thumb drive (in PDF format).

*Note: It is not required that the electronic copy be formatted as a "reprint version" (e.g. inclusion of blank sheets so that the PDF prints correctly)*



## 8. SELECTION CRITERIA

Respondent's qualifications will be evaluated based on the following significant factors:

**A. Developer Team Background:** Strength of qualifications and experience of key team members to be assigned to the project and demonstrated ability of the team to work collaboratively to successfully develop and manage projects of similar type, size and scope.

**B. Technical knowledge, construction expertise and comparable development experience:**

Description and Qualifications of Development Team's Ability to:

1. Work collaboratively in a development management role with a public institution
2. Manage the design and construction of comparable projects
3. Secure Project entitlements
4. Manage project budgets and delivery schedules

Description and Qualifications of Development Team's Experience with:

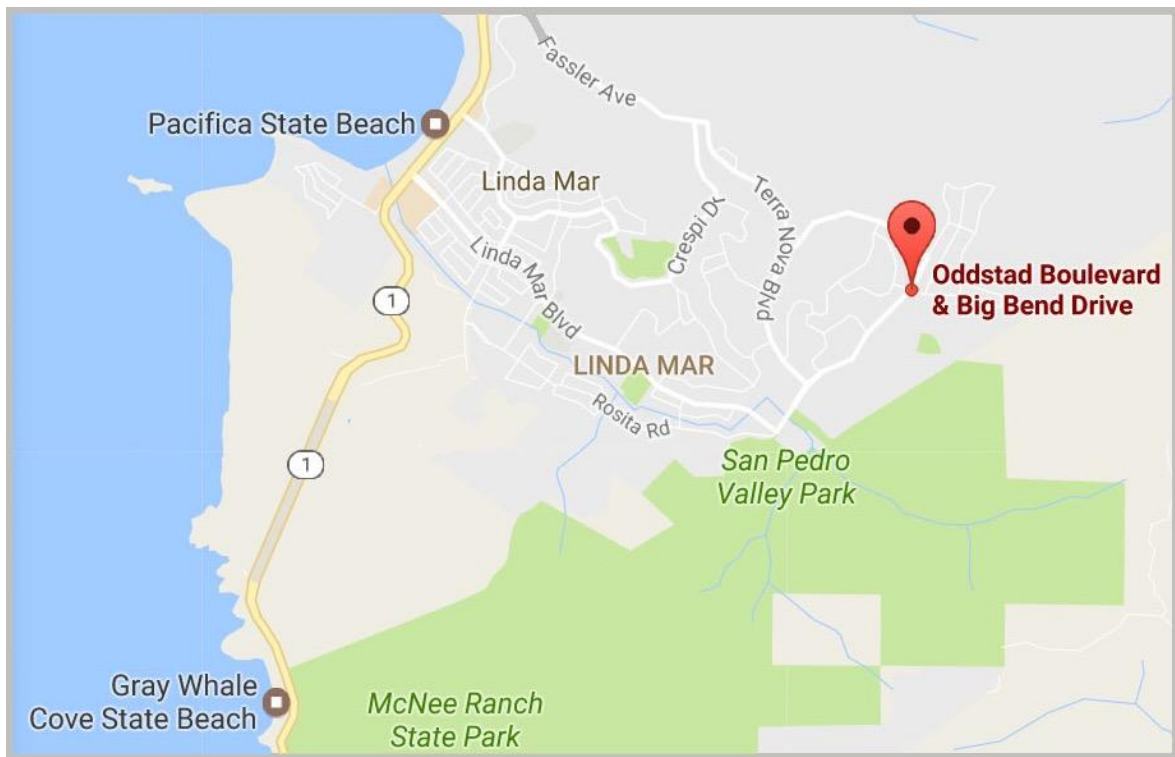
1. Comparable projects are of generally similar size and/or cost
2. Type 5 Multi-family Housing
3. Business relationship with a public agency
4. Bay Area and California development
5. Thorough understanding of the C.E.Q.A process

**C. Adequate Firm Capitalization:** As evidenced by required submittals.

**D. References:** Letters of Reference for company in this role and for individuals to be assigned.

## ATTACHMENT A

### Location Site



**ATTACHMENT A**

**Project Site**

