

J. Attachment A: Description of Submittal Requirements

Responses to this NOFA should be organized as follows:

1. Summary. Provide a concise narrative description of the proposal for developing the proposed site, including the overall size, uses, resident and community amenities, general layout, and summarized financing proposal.

Provide **Form 2 - Proposal Metrics** form.

2. Sponsor Background Information. Provide copies of the following for the Lead Developer or Co-Developer entity:

- Certificate of Good Standing
- Certification of 501(c)(3) status
- Previous 2 years of tax returns or audited financial statements with management letters
- Borrower's organizational chart
- Borrower Board Resolution that authorizes application for MOHCD funds

3. Applicant Experience and Capacity. Using **Form 3 - Respondent Description**, provide the name of each organization, names of the organization's Director (or equivalent position) and primary contact persons, and phone numbers and email addresses for each of the following:

- Lead Developer and Co-Developers (if applicable)
- Development Consultant (if applicable)
- Construction Manager (s)
- Architect (s)

Provide a concise narrative to summarize the organizational structure of the Applicant, including the roles of Developer, Co-Developer and Development Consultant. Identify and briefly describe the experience of key development staff. Provide **Form 4 - Projected Staffing Workload**.

Please provide **Form 5 – Qualifying Project Form** to document how Qualifying Projects characteristics meet each of the experience categories below (developer, owner, property manager, service provider.) The Development Team may submit more than one (1) Qualifying Project or each of the experience categories:

- a. Minimum Development Experience**
- b. Minimum Asset Management/ Ownership Experience**

To demonstrate the minimum required development team experience, each team should submit one project for each experience category. When appropriate, teams may submit the same project as evidence of experience across multiple experience categories, or may use different projects to demonstrate experience across categories. In all cases, no more than two (2) total Qualifying Projects should be submitted. Qualifying Projects will not be scored, but are used to identify if the proposed Development Team meets the minimum development team experience required to develop the Site.

The proposed Developer and Owner must document its capacity to successfully manage condominium real estate assets in compliance with federal, state and local regulations. The proposed Developer and Owner must submit **Form 6 – Ownership Asset Management Capacity Form** to document the experience with HOA documentation and budget creation, including obtaining approvals from the BRE; its residential condominium projects experience; and proposed real estate transaction management staffing capacity.

4. Readiness. In Tab 4, Applicant should provide the following documentation to demonstrate the Project's level of readiness to proceed with development:

- Evidence of Site Control
- Appraisal
- Phase I Environmental Assessment of property
- Scaled Map showing all site amenities
- Project Milestone Schedule (**Form 1: Project Schedule**), indicating which, if any, milestones have already been achieved.

5. Cost Effectiveness. In Tab 5, describe the overall financing plan for the Project that demonstrates that the Project meets threshold requirements, including a full MOHCD development application proforma in Excel with sufficient information to allow MOHCD to fully determine each Project's feasibility, including:

- Sources & Uses, including all terms related to equity and debt, e.g., eligible basis assumptions, 50% test calculations, construction and permanent loan rates and terms.
- Unit schedule, including levels of affordability.

In the narrative, highlight any innovative financing approaches intended to minimize MOHCD's projected capital gap financing. Highlight also any innovative (i.e., non-standard, routine or commonly used) direct or indirect cost-cutting strategies relevant to overall development, construction or operating expenses, including estimated savings calculations if appropriate.

6. Serves the Historically Under-Served. In Tab 6 through 8, provide narrative evidence of how project will address MOHCD's Racial Equity Framework. MOHCD's Racial Equity Framework is MOHCD's commitment, through its policies, programs, and practices, to working in partnership with communities, organizations and those that have been most harmed by racial inequity especially Black, Brown, Indigenous and other San Franciscans of Color.

Provide narrative evidence of neighborhood investments benefitting low-income residents. Examples may include number of affordable housing units built over time, relative to other neighborhoods. All citations must be verified.

For the purpose of this section, "neighborhood" shall refer to the Supervisorial District.

Submit a draft affirmative marketing plan that outlines initial occupancy outreach efforts, especially to City priority populations, including Certificate of Preference (COP) Holders, Displaced Tenants (formerly Ellis Act evictees), neighborhood residents (as defined by Local Ordinance), and households that live/work in San Francisco.

Provide a Community Outreach Plan outlining:

- The team's philosophy on community engagement;
- Process for establishing and/or building positive relationships with surrounding neighbors and the larger community;
- Efforts designed to engage all interested community members, including monolingual non-English speaking members of the community;
- How the Development Team intends to comply with the City's Language Access Ordinance.

7. Demonstrates Excellent Design. In Tab 9, provide a narrative describing the Project's development concept and green building commitment design and innovation, including 11"x17" paper designs of the Project's:

- Site Plan
- Conceptual Façade Elevations
- Floor Plans
- Commercial Space Plan

8. Disclosure Form. Submit a completed and signed copy of **Form 7 – NOFA Disclosures**, which requires any respondent to this NOFA to disclose defaults, lawsuits, legal proceedings, bankruptcy filings or financial interests affiliated with MOHCD staff or Citywide Affordable Housing Loan Committee members.