



**Request for Qualifications and Request for Proposal  
Affordable Senior Housing Project**

**Development Partners for Affordable Senior Housing  
Project  
Burlingame, California**



June 2025

# Affordable Housing Project–RFQ/RFP

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# Affordable Housing Project–RFQ/RFP

## I. INTRODUCTION AND OVERVIEW

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The Peninsula Health Care District (“District”) is seeking a potential affordable housing developer to develop a proposed 100 percent affordable senior housing project (“Project”) on an approximately 2-acre site located at 1720 Marco Polo Way, 1730 Marco Polo Way, and 1740 Marco Polo Way in the City of Burlingame (“City”) with Assessor’s Parcel Numbers 025-144-050, 025-144-190, and 025-144-170 (“Property”). This consolidated Request for Qualifications (“RFQ”) and Request for Proposals (“RFP”) (together, the “RFQ/P”) provides developers an opportunity to submit a Statement of Qualification and Development Plan addressing the criteria set forth in Sections IV and V that demonstrates its qualifications for developing the Property consistent with the District’s vision and principles described in this RFQ/P.

After reviewing the submittals and interviewing select parties who have submitted responsive submittals, the District anticipates selecting a preferred developer and entering into an Exclusive Negotiation Agreement (“ENA”). The process and criteria that will be used for selecting the District’s preferred developer are described in Section VI of this RFP/Q. In the event the District and the selected developer mutually agree on the terms of an ENA, the District will commence negotiations of a long-term ground lease and disposition and development agreement with the selected developer.

### A. Peninsula Health Care District

The District is an independent special district of the State of California that serves a defined geography by addressing the local health needs of the residents within its boundaries, which includes the cities of San Bruno, Millbrae, Burlingame, Hillsborough, and San Mateo, portions of Foster City, and a small area in southeast South San Francisco.

Health care districts throughout the State of California provide a wide range of services from acute care hospitals to subacute and skilled nursing facilities, adult day health programs, outpatient clinics, ambulance services, as well as education and wellness programs. Health care districts are governed by a publicly elected board of directors that is accountable to the constituents it serves. The Peninsula Health Care District Board (“Board”) is composed of five active board members who donate their time and expertise in furtherance of the District’s vision: **that all residents of the District enjoy optimal health through education, prevention, and access to needed health care services.**

As the community’s health needs have changed and evolved, the District’s role in addressing those needs has evolved as well. The District has moved from an acute care hospital owner/operator focus, to a broader community health focus.

The District has a rich history, beginning with its focus in 1947 on a strong, sustainable community hospital, to support health care delivery in perpetuity. The following is a brief history of the District:

- 1947: Formed by state legislation to allow communities a funding mechanism to fund hospitals.
- 1950 - 1985: Built and operated Peninsula Hospital.
- 1985 - 2011: Remained owner of the hospital; brought in Mills-Peninsula/Sutter Health as the operator.
- 2011 – Present: Sutter Health built, owns, and operates the new seismically compliant Mills-Peninsula Medical Center on the District’s land through a lease and service agreement.

With the District’s hospital commitment to the community addressed through the master lease agreement with Sutter Health, the District has focused on identifying gaps in health services, addressing health priorities of its constituents through community-based programs and services, and providing responsible stewardship of public assets. Over the last several years, the District has

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embarked on several initiatives that address a range of health care needs of its constituents. These include:

- The development of the Trousdale, an assisted living and memory care facility;
- Sonrisas Dental Health, an innovative dental care model that removes barriers for the elderly and special needs communities;
- allcove San Mateo, a youth wellness center that addresses the mental health needs of youth ages 12 – 25;
- PHCD Health & Fitness Center, which offers fitness classes, health education and socialization programming for older adults;
- A Community Grants Program that awards non-profit agencies serving the most vulnerable residents;
- In July 2018, the District entered into an exclusive negotiating agreement with certain developers for the development of the former Peninsula Wellness Community (PWC) project on approximately 6.84 acres of property located between Mills Peninsula Medical Center and Maro Polo Way in the City of Burlingame. The former PWC project contemplated the development of the site with a medical office building, community Hub, market-rate senior housing, and affordable senior housing. The District and the developers were unable to mutually agree on the terms of a ground lease and disposition and development agreement for the development of the former PWC project. The exclusive negotiating agreement for the former PWC project expired in 2024.

While the exclusive negotiating agreement for the former PWC project expired in 2024, the District recognized the critical need for affordable senior housing. The proposed Project is intended to provide seniors with affordable housing options that also offers support services that promote residents' independence, health, and social well-being.

## **B. The Need for Affordable Senior Housing**

San Mateo County demographics indicate that approximately 18.7 percent of the County's population consists of residents 65 and older based on recent data from the U.S. Census Bureau. Demographic projections show that by the year 2030, San Mateo County residents 65 and older will increase by 72% and 85 and older by 148%.

Housing for seniors is critical for supporting health and preventing illness. Projections suggest that by 2029 more than 50% of older adults in the United States will be unable to pay for their housing needs. For seniors, higher housing costs can mean that other essentials such as food and medical needs are neglected in order to afford rent. A key tool to promote healthy aging is to provide affordable housing for seniors who have limited resources so more of their resources can be spent on things like food and medicine. San Mateo County has a very high cost of living compared to U.S. averages making it a challenging place for seniors to live comfortably. Affordable senior housing will allow community members to stay in the area instead of being forced out due to pricing concerns. Enabling seniors to continue residing in the community supports diversity and an overall more vibrant living environment.

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## II. *VISION AND GOALS*

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### **Project Vision and Goals**

The Project is intended to provide much needed affordable senior housing to allow aging community members to stay in San Mateo County without having to keep up with the cost of living in the area. The Project is located adjacent to existing medical care facilities, public transportation, and local residences. Placing seniors within walking distance of facilities that can meet their medical needs and within walking distance of public transit will allow them to maintain optimal health and remain active within the surrounding area.

The Project is envisioned as a community for seniors to have thriving and full lives. Our vision and core objectives are to provide the following:

- Provide quality, safe, stable, and accessible housing that meets the needs of the aging population while also contributing to the broader community.
- Develop housing that is affordable to a range of incomes, with emphasis on serving those at 80 percent of Area Median Income (“AMI”) or lower.
- Design buildings with features that accommodate mobility challenges, including but not limited ramps, elevators, and wider doorways.
- Incorporate on-site supportive health care and social services to address the specific needs of seniors.
- Integrate senior housing with community amenities, such as open spaces, libraries, medical care facilities, and local businesses to help foster a sense of community and connection.
- Create community spaces for seniors to engage in outdoor activities and social activities and gatherings.
- Establish a robust operation and maintenance program to ensure that completed buildings are well-maintained and remain safe, stable and accessible.
- Provide a reasonable economic return for the use of District land.

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## III. DEVELOPMENT OPPORTUNITY

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The Property comprises approximately 2 acres located at 1720 Marco Polo Way, 1730 Marco Polo Way, and 1740 Marco Polo Way in the City of Burlingame as generally depicted in Figure 1 below. The Property is adjacent to the existing AbilityPath Center located at 1764 Marco Polo Way, which the District acquired in 2023 and is not contemplated to be included within the footprint of the Project area. The Property is also adjacent to undeveloped property owned by the District, which the District is evaluating for potential future development as part of a separate project.

A portion of the Property is developed with buildings that include a mix of medical and general office buildings. The remaining portion of the site is undeveloped.

Adjacent to the proposed Project area is a 60-foot-wide easement for the Hetch Hetchy water pipeline serving San Francisco and a number of Peninsula communities which is under the jurisdiction of the San Francisco Public Utilities Commission. The Hetch-Hetchy easement area is not included within the site area proposed to be developed with the Project.

**Figure 1 Area Map with Proposed Property Area Outlined**



The neighborhood includes a mix of health-related uses, retail, and residential uses. The area is served by a joint BART/Caltrain station, located approximately one mile from the site, and has convenient highway access to both U.S. Highway 101 (via Millbrae Avenue) and Interstate 280 (via Trousdale Boulevard). San Francisco International Airport is to the northeast of the neighborhood. Major thoroughfares in the area include El Camino Real, Trousdale Boulevard, and Millbrae Avenue.

Mills-Peninsula Medical Center (Sutter Health) is located east of the Property and is a modern 241-bed general acute-care hospital that opened in May 2011. Several medical office buildings of varying ages and sizes are also located throughout the neighborhood. Also on the north side of Trousdale Boulevard is The Trousdale, a 132-apartment assisted living and memory care community owned by the District.

Burlingame Plaza, a community shopping center located at the northwest corner of El Camino Real and Trousdale Boulevard serves the community. Anchors at Burlingame Plaza include Lunardi's Market and CVS drug store, and tenants include a variety of stores and restaurants.

Multi-family residential uses are located closer to the major streets, with single-family residences to the south, east, and west of the Property.

### A. General Plan and Zoning

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The following summarizes the General Plan and zoning regulations currently applicable to the Property. The selected affordable housing developer will be responsible for evaluating and confirming the applicable land use regulations that apply to the Property and the development of the Project. The selected developer will also be responsible for obtaining the necessary entitlements and approvals from the City and other applicable public agencies for the development of the Project, including but not limited to compliance with the California Environmental Quality Act (“CEQA”).

## General Plan

The Property is designated North Burlingame Mixed Use under the City’s General Plan. Residential uses are permitted in the North Burlingame Mixed Use designation. The General Plan states that housing development within the North Burlingame Mixed Use designation “should provide housing options for all income levels.” (General Plan, p. CC-10.) The allowable residential density is between 20.1 to 140 units/acre.

## Zoning

The Property is located within the North Burlingame Mixed Use Zoning District (NBMU). The purpose of the NBMU zoning district is to implement the General Plan North Burlingame Mixed-Use designation by providing a distinct defining area with housing and complementary commercial and office uses at urban-level intensities, and that takes advantage of the adjacent multimodal transit center.

Under the NBMU zoning district, certain residential uses are allowed, including multifamily residential uses which are permitted by-right. Elderly and Long-Term Care facilities require a Conditional Use Permit (CUP) and Residential Care Facilities also require a CUP. Nursing homes are prohibited in the NBMU zoning district.

Residential density, building height, and other development standards allowed within the NBMU zoning district vary based on the level of community benefits provided. A developer may elect to develop at Tier 1, Tier 2, or Tier 3 development standards which are generally summarized below. Projects using Tier 2 or Tier 3 standards must provide 1) certain specified community benefits set forth under the City’s Zoning Code, and 2) obtain approval of a special permit from the City.

- Tier 1 establishes base level development standards and authorizes development at a maximum density of 40 dwelling units/acre. No additional community benefits are required, and a special permit is not required.
- A Tier 2 project increases the allowed density to 80 dwelling units/acre and requires at least two community benefits from the list of Community Benefit Objectives set forth under the City’s Zoning Code. A special use permit is required.
- A Tier 3 project increases the allowed density to 140 dwelling units/area and requires at least three community benefits from the list of Community Benefit Objectives. A special use permit is required.

In addition to varying density standards, the City’s Zoning Code establishes different development standards for Tiers 1, 2, and 3, which will need to be evaluated and confirmed by the selected affordable housing developer.

## **B. Preliminary Development Concept**

Based on the Project Vision and Goals previously outlined, the preliminary development concept for the Project includes one or more buildings that provide approximately 225 units with a mix of studio, one-bedroom, and two-bedroom units. The units will be age-restricted units with a portion allocated to veterans, if feasible.

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It is anticipated that the Project will provide services and amenities so that residents can congregate, receive health services, eat, and socialize. Such services should include on-site supportive health care and social services to address the specific needs of seniors. The Project should also be designed to incorporate features that accommodate mobility challenges, including but not limited ramps, elevators, and wider doorways.

The Project is also envisioned to help foster social interaction and support independence. To that end, the Project should strive to integrate senior housing with community amenities, such as open spaces, libraries, medical care facilities, and local businesses to help foster community engagement and connection.

### **C. Disposition and Development Agreement and Ground Lease**

The District intends to ground lease the property to the developer. If the District and selected developer mutually agree on the terms of an ENA, the parties will negotiate the terms of a disposition and development agreement (“DDA”) and ground lease.

The ENA will identify the term of exclusivity, the roles and responsibilities of the District and the selected developer during the negotiation period for the DDA and ground lease. The ENA will include a number of benchmarks and milestones that must be satisfied in order for the ENA to remain in force. The District reserves the right to terminate negotiations on the terms of the ENA at any time. In addition, at the time of the execution of the ENA, the District may require a non-refundable deposit to be provided.

The amount and structure of any ground lease payments, the term of the ground lease, among other key terms, will be negotiated during the ENA period.

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## IV. STATEMENT OF QUALIFICATIONS SUBMISSION

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The District is seeking affordable housing developers with a demonstrated, successful track record with similar affordable housing projects in the Bay Area and beyond. Interested developers are invited to provide a Statement of Qualifications (as set forth in this [Section IV](#)) and Development Plan (as set forth in [Section V](#) below), responding to the topics described below. The Statement of Qualifications should address all topics in sections and subsections (A) through (D).

### A. Development Entity

#### 1. Transmittal Letter

Provide a 1 to 2-page transmittal letter that summarizes respondent's Statement of Qualifications. The transmittal letter should be in the form of a standard business letter on official business letterhead and signed by an authorized representative of the respondent.

#### 2. Affordable Housing Developer Description

Provide a brief description (two to three pages) of the affordable housing developer including narrative and quantitative metrics such as number of employees, dollar volume per year, and office locations, among other descriptive information. The submission should include portfolio information such as locations and status of projects, project type, and number of housing units among other descriptive information.

#### 3. Development Team

In two to three pages, identify the development team, including key participants to be involved in the project. The primary focus should be on the developers and key team consultants and contractors. Please share any history of team members working together.

#### 4. Team Roles

In two to three pages, identify the roles of the respective development team members and submit resumes for the project manager and key individuals who will be involved in the designing, development, implementation, and operation of the development. Provide an organization chart to illustrate the management structure of the team.

### B. Financial Qualifications

Note that the District and its consultants will maintain the confidentiality of certain financial information provided by respondents as a part of the Statement of Qualifications review process. Respondents may provide proprietary financial information under separate cover (please review TERMS AND CONDITIONS, Opening of Proposals and Release of Information Section and the Confidentiality Section).

#### 1. Financial Capacity

**Respondent should be prepared to fund/finance the full cost of the Project.** Provide a description of developer's financial capacity and backing, including general financial capabilities and partnerships. Describe the developer's need for and ability to raise equity and additional capital sources. Describe how pre-development costs will be funded.

The Statement of Qualifications should describe federal, state, and local funding programs that the Respondent anticipates it may apply to in order to fund the Project. The Respondent should identify and describe its prior experience in successfully obtaining tax credit financing for similar projects. The Statement of Qualifications should also identify and describe potential private financing mechanisms and sources for the Project.

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## 2. Detailed Financial Qualifications

In order to demonstrate access to equity capital and financing resources to carry out entitlement and development of the property, provide the information indicated below.

- 2.1 Composition of current real estate portfolio.
- 2.2 Recent history (last five years) in obtaining financing commitments, detailing type of project, financing source, and amounts committed. This should include experience in obtaining tax credit financing and the sources of tax credit financing for similar projects.
- 2.3 Projects in pipeline, including status, development schedule and financial commitment required of developer, and a description of project financing methods, sources, and amounts.
- 2.4 Audited financial statements for the past three years. Place in separate, sealed envelope marked "**Confidential**" if respondent would like the District to maintain the confidentiality of this portion of the response. (See TERMS AND CONDITIONS regarding the limits of confidentiality).
- 2.5 Specific sources of debt/equity capital that may be used for this project, including relationship to the developer (outside lender, parent company, etc.) and contact information.
- 2.6 Adverse actions if any, taken by any funding sources or financial institutions against the developer or joint venture partner, such as terminating or restricting the use of funds anytime during the past fifteen years.
- 2.7 Litigation, if any, in which developer (and any related affiliated entities) is involved or settled litigation over the last fifteen years.

## C. Experience

### 1. Respondent Experience

Describe the relevant development experience of the respondent. List a minimum of two and a maximum of five projects that are most comparable to this project. Similar projects include those with one or more of the following types of attributes: (1) residential, (2) senior housing and health related facilities, (4) development on long-term ground lease, (5) projects on land owned by a public agency and/or require direct coordination with public agencies; and (6) projects that involved substantive public outreach process, among others.

For each project identified by the developer, please provide the following information:

- 1.1 Project name and type.
- 1.2 Location, including address, and photograph(s).
- 1.3 Size, mix of uses, and key tenants.
- 1.4 Development timeline (from developer selection/site control to completion of construction, indicating phasing as relevant).
- 1.5 Project cost, capital and financing sources used, and indications of economic performance.
- 1.6 General description, including role of development team and key project personnel, unique challenges of project, occupancy and history.
- 1.7 Identification of developer and team and explanation if different from the proposed team for this project.
- 1.8 Description of the role of public agencies involved in the project.
- 1.9 Ongoing role of Respondent in the operation and maintenance of the project.

### 2. Respondent Team Members' Experience

Please provide relevant experience of the development team members, identifying key team member firms and staff members assigned to this project. Provide no more than three projects per team member. Provide information, including the project name, location, description, services provided,

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dates of service, and outcome of work effort. These projects may be, and are encouraged to be, the same as those submitted under Section C.1. **Respondent Experience.**

## **3. Local Experience**

Provide a statement describing the team’s knowledge and experience with the City of Burlingame and other applicable jurisdictions relevant to the respondent’s ability to implement the project. Describe the respondent’s involvement in local community activities and initiatives in the City of Burlingame and in other areas of San Mateo County. Also describe experience with development in urban environments and past experiences with governmental and/or non-profit entities.

## **4. References**

Please provide at least three references for the developer, including public and private entities, as well as financial.

## **D. Project Understanding and Approach**

### **1. Physical and Market Context and Development Opportunities and Constraints**

Describe the key opportunities and constraints as you see them from a market and planning perspective, and your experience addressing such issues or opportunities on past projects.

### **2. Regulatory, Political and Community Context**

Summarize the developer’s understanding of the regulatory, political, and community context.

### **3. Approach to Developing a Plan**

Summarize the developer’s understanding of the process required for redevelopment of the property, including the context for investigating, planning, and entitling the property. Include examples from projects described in Section C, Experience, to illustrate successful strategies applied in previous planning efforts. Include key project milestones or achievements that will help to achieve a successful project.

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## V. *DEVELOPMENT PLAN PROPOSAL SUBMITTAL REQUIREMENTS*

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In addition to the Statement of Qualifications described in Section IV of this RFP/Q, the Respondent shall submit a Development Plan proposal that addresses the topics described below.

The Development Plan submittal must specifically address how the District’s vision for the Project and its objectives will be met by the developer’s plan, the developer’s financial and management commitments to the Project, and the strategies for delivering ongoing senior support services. The developer should also identify issues critical to the feasibility of project development.

### **A. Development Concept**

Provide in a narrative and graphic description your development concept for the Project. This concept must correspond with the financial proposal and business plan and be consistent with the District’s objectives. The submittal should include narrative descriptions as well as supporting maps and graphics. At a minimum, the development concept should include a development plan that clearly shows the following:

1. The proposed number of buildings and residential units.
2. The square footage of the residential units, the proposed number of studios, one-bedroom, and two-bedroom units.
3. The proposed affordability levels of the residential units and the number of residential units at each affordability level.
4. The proposed utilization of land in acres and how the proposed Project will relate visually to the Hetch-Hetchy easement area.
5. Proposed community benefits that the Respondent proposes to incorporate into the Project including any on-site supportive health care and social services to be provided to residents.
6. Identify key amenities and services that would be provided to residents of the Project and how such amenities and services will help foster social interaction and community engagement.
7. Any graphics and/or images, with supporting text that help articulate the development concept and strategy, including but not limited to building type and building character. Architectural style shall reflect Spanish Colonial or, in the District’s discretion, another style consistent with the high-quality prevailing architectural style of the City of Burlingame.
8. Identify key amenities anticipated to be provided to residents, including any potential strategic alliances or partnerships with other organizations that may be available to address the needs of the residents.
9. A section that clearly describes any elements that differ from the vision for the project as described in this RFQ/P.

### **B. Development Strategy and Timeline**

Provide a narrative description of the proposed entitlement pathway and strategy for the development of the Project. At a minimum, the development strategy and timeline should clearly address the following:

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1. Identify the entitlements and approvals from the City of Burlingame and other public agencies that Respondent anticipates will be necessary for the Project. This should take into account the key steps that the Respondent intends to complete during the pre-development process including the attainment of all entitlements, approvals, and agreements with third-parties, to the extent applicable.
2. The proposed strategy for complying with CEQA (e.g., CEQA exemption, Negative Declaration).
3. Identify whether any CEQA or other streamlining measures may be applicable to the Project.
4. A timeline with proposed milestone dates for the development of the Project, commencing from the selection of the affordable housing developer to the commencement of construction. The timeline should include proposed milestone dates for key items, including but not limited to the following: negotiation and execution of ENA; submittal of planning applications to the City of Burlingame; approval of entitlements from the City of Burlingame; negotiation of a DDA and ground lease; application for federal, state, and local funding and private financing; execution of the DDA and ground lease; and commencement of construction. The timeline should make clear a) critical path items that may impact the proposed timeline and milestone dates, and b) which activities will take place sequentially and which items shall take place contemporaneously.
5. A community outreach strategy for the Project, including any proposed community meetings or workshops or other public outreach plans during the entitlement process to engage the community.
6. Background information on proposed infrastructure design and needs given site conditions, cost considerations, and sustainability goals.
7. Anticipated project phasing for the development of the Project.
8. Identify the proposed strategy for operating, maintaining, and managing the Project once development has been completed and whether the Respondent intends to be responsible for ongoing operation, maintenance, and management of the site.

### **C. Development Financing and Funding Strategy**

The selected affordable housing developer will fully fund all costs associated with the development of the Project, including pre-development, entitlement, infrastructure, land development, and other associated costs. In addition, all risks of cost overruns or increases, market fluctuations, construction delays, and other development contingencies are to be borne by the developer.

Please provide a narrative of the likely financial structure of the Project, including potential sources and amounts of equity and debt financing, and any expected sources of public financing. At a minimum, the development financing strategy should address costs for the following:

1. **Pre-Development Costs.** The selected developer will fund all of the pre-development costs, including but not limited to: costs of all necessary due diligence; infrastructure design; community outreach; refinements to the development program; negotiations of the ENA, ground lease and DDA; submittal and processing of planning applications; technical analysis and other studies required under CEQA; building design; and financial feasibility studies and analysis.
2. **Infrastructure, Building Demolition, and Construction Costs.** The selected developer will be responsible for funding, or obtaining financing, for all infrastructure, demolition,

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and construction costs. The selected developer will prepare the site, including demolition of existing buildings, construct the backbone infrastructure and vertical buildings.

3. Proforma. Please provide a project proforma that includes a preliminary breakdown and projection of the following: sources of financing/funding; estimate of the total pre-development and development costs (hard costs and soft costs); operating expenses and revenues of the project was completed; projected rental income, including the number of units, unit sizes, and affordability levels based on AMI.

### **D. Management and Operations Plan**

Provide a management and operations plan that describes the developer’s proposal in connection with ongoing on-site operation and management of the site once the Project is completed. The plan should identify key personnel required to operate and manage the Project once completed.

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## VI. SUBMISSIONS AND EVALUATION CRITERIA

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### I. Submissions of Statement of Qualifications and Development Plan

Submissions should be succinct and printed double-sided. One original and 10 pdf copies are required; however, only one set of materials marked "Confidential" are required. Please also submit one copy electronically. Submissions should be sent to:

Ana Pulido  
Peninsula Health Care District  
1819 Trousdale Drive, Suite 1210  
Burlingame, CA 94010

### II. Statement of Qualifications and Development Plan Evaluation Criteria

The Statement of Qualifications and Development Plan submitted by each prospective developer will be evaluated according to the criteria stated below:

<b>Weighted Evaluation Criteria</b>	<b>Possible Points</b>
A) Developer Qualifications	25
B) Development Concept	25
C) Development Strategy and Timeline	15
D) Financial Proposal	20
E) Management and Operations Plan	15
<b>Total Possible Points</b>	<b>100</b>

### III. State of Qualifications Evaluation Criteria (25 Points)

As part of selecting the respondents, the District and its consultants (Evaluation Team) will consider the criteria outlined below.

#### A. **Firm and Individual Team Member Experience**

The Evaluation Team will consider the experience of the developer and the specific individuals proposed for assignment on this project.

#### B. **Comparable Project Experience**

Experience working on similar projects in similar contexts will be evaluated. Experience with a public entity landowner will be valued strongly. This criterion will include demonstrated experience with successful senior housing projects, as well as office space development, non-profit/public/private partner experience.

#### C. **Financial Qualifications**

The Evaluation Team will evaluate the developer's demonstration of a credible ability to provide and/or leverage adequate funds to support all costs, including pre-development costs. Financial strength at

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this stage will be based upon the developer’s financial record and successful financing of comparable projects, including developer’s experience in successfully obtaining tax credit financing.

## **D. Project Understanding and Approach**

The Evaluation Team will prioritize respondents demonstrating superior understanding of conditions affecting the development opportunity, and with appropriate experience and ideas for addressing those conditions.

## **E. References**

The Evaluation Team will also consider responses from the references provided. These references will be contacted and interviewed by the District and its consultants for feedback related to the developer’s performance as well as funding and financing. The Evaluation Team also reserves the right to contact individuals *not* listed by the respondents as references but who have material knowledge of the process and outcomes of the respondents’ past projects.

## **IV. Development Plan Evaluation Criteria**

### **A. Development Concept (Possible Points: 25)**

1. The response demonstrates an understanding of the market, creativity and thoughtfulness of overall physical planning, and satisfies the District’s vision for the Project, as set forth in the RFQ/P.
2. The response presents a narrative and diagrams that describe the development strategy, including the proposed infrastructure and land development phasing schedules.
3. The response demonstrates quality of design and attention to detail throughout.
4. The response identifies the community benefits necessary to obtain a Tier 2 and/or Tier 3 special permit under the Burlingame Zoning Code.

### **B. Development Strategy and Timeline (Possible Points: 15)**

1. The response describes a feasible entitlement strategy and provides a detailed description of the entitlements and approvals required for the Project.
2. The response demonstrates an understanding of the processes and approvals needed to timely implement the entitlement strategy.
3. The response demonstrates that the respondent has the experience, capability, and personnel to effectively and timely manage the implementation of the entitlement strategy.

### **C. Financial Proposal (Possible Points: 20)**

1. The response provides a detailed and realistic financing strategy, including anticipated sources of funding, approximate return requirements for equity, the costs of other financing, and a complete description of how the project will be initiated.
2. The financing strategy supports the land development strategy.
3. The response describes a realistic and favorable financial structure for payments to the District, including base lease payments and any proposed financial participation.

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4. The response provides a complete project financial pro forma showing all revenues and costs on a year-by-year basis, sources and uses of financing, lease and participation revenue to the District.

### **D. Management and Operations Plan (Possible Points: 15)**

1. The response describes a sound organizational structure and a clear decision making process among team members and within the development entity.
2. The response references the specific experience and expertise with similar projects of day-to-day project managers and demonstrates the firmness of the commitment of key individuals.
3. The response establishes a commitment to maintaining a local presence during all phases of project development, construction, marketing, leasing and sales, management, and operations.
4. The response describes a thoughtful public/community outreach/interaction strategy.

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## VII. SELECTION SCHEDULE

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Posting of Draft RFQ/P on District Website:	June 18, 2025
Public Meeting re Draft RFQ/P:	June 26, 2025
RFQ/P Issued:	July 2, 2025
Pre-submission Conference:	Week of July 21, 2025
Deadline for Receipt of RFQ/P Questions in Writing:	August 8, 2025
District Responds to RFQ/P Questions:	Week of August 25, 2025
Deadline for RFQ/P Submittals by Candidate Developers:	September 26, 2025
District Reviews Responses and Conducts Interviews:	October – November 2025
District Selects Developer:	December 2025
District and Selected Developer Enter into an Exclusive Negotiating Agreement:	January – March 2026

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## VIII. TERMS AND CONDITIONS

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### **Additional Information**

To facilitate the due diligence process, the District will provide access to applicable information during the RFQ/P response period through the following means:

**Individual Meetings with District staff and consultants.** The District may meet with certain development teams separately to answer questions. Outside of these forums, the District will also respond to questions submitted in writing via e-mail. If the District believes the responses are relevant to all applicants, and do not compromise proprietary or competitive aspects of the developer's response, the questions and answers will be e-mailed to all short-listed developers. No representation is made, however, that precisely identical information will be provided to each respondent.

**Document Lists and Links.** The District will provide background information and data via DropBox or other secure file sharing site. Developers may, however, need to retrieve additional documents from other sources.

### **Reservation of Rights**

The District, at its discretion, reserves the right to:

1. Change any element of this RFQ/P, including modification of the proposed Project described in this RFQ/P or cancel this RFQ/P;
2. Accept and/or reject any or all responses received in response to this RFQ/P;
3. Determine whether a response submitted in response to this RFQ/P fails to meet any aspect of the requirements of the RFQ/P;
4. Obtain modification or clarification necessary to properly evaluate a response; and
5. Obtain references regarding any respondent's past performance from any source.

Neither issuance of this RFQ/P nor evaluation of any responses obligates the District to continue with the issuance of an RFQ/P.

### **Submission of Statement of Qualifications**

1. This RFQ/P is only an invitation to submit proposals and does not commit the District in any way to enter into an agreement or to proceed with the proposed project. The issuance of this RFQ/P does not obligate the District to pay any costs whatsoever incurred by any respondent in connection with the project or the proposal, including: (a) the preparation or presentation of a proposal; (b) any supplements or modifications to this RFQ/P; or (c) negotiations with the District or other party arising out of or relating to this RFQ/P or the subject matter of this RFQ/P. The determination by the District to select a particular proposal shall not imply acceptance of the respondent's business offer, which will be subject to further negotiation prior to approval of an ENA, ground sublease or other agreements with the District.
2. The information presented in this RFQ/P and in any other information provided by the District to respondents is provided solely for the purpose of facilitating responses to this RFQ/P. It is the sole responsibility of the respondents to assure themselves that the information contained in this RFQ/P or other documents is accurate and complete. Information is provided in good faith but may not be accurate or complete. Respondents should not rely solely on this information and are responsible for confirming information and conducting their own due diligence.

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3. Except as specifically otherwise provided in any ENA to be executed by the District and the successful respondent, the District expressly reserves the right at any time, and for its own convenience, in the District's sole discretion, to do any or all of the following:
  - a. Waive or correct any defect or technical error as to form or content of this request or in any response, proposal, or proposal procedure, as part of the District or any subsequent negotiation process.
  - b. Reject any and all RFQ/P submissions, without indicating any reason for such rejection.
  - c. Reissue an RFQ/P.
  - d. Modify or suspend any and all aspects of the selection procedure, modify the scope of the proposed project or the required responses, modify the minimum components of the development concept, or modify the process indicated in this solicitation.
  - e. Request that respondents clarify, supplement, or modify the information submitted.
  - f. Extend deadlines for accepting responses, request amendments to responses after expiration of deadlines, or negotiate or approve final agreements.
  - g. Negotiate with any, all, or none of the respondents to the RFQ/P.
  - h. Make a selection based directly on the proposals or negotiate further with one or more of the respondents.
  - i. During negotiation, expand or contract the scope of the project, including adding or subtracting land parcels to or from the project, or otherwise alter the project concept from that which was initially proposed in order to respond to new information, community or environmental issues, and opportunities to improve the financial return from the project. If negotiations with the successful respondent fail to proceed to the reasonable satisfaction of the District, negotiate with and enter into a final agreement with another respondent, or begin the selection process anew.
4. Selection of a respondent and granting of an exclusive right to negotiate should not be construed as an approval of the proposed uses, configuration, or design of the project. No final approval will have occurred unless and until the Board has approved and executed a ground lease and the required documentation thereto.
5. By submitting a proposal, the respondent certifies to the District that the respondent has not paid, nor agreed to pay, and will not pay or agree to pay, any fee or commission, or any other thing of value contingent on the award of a lease or other agreement with the District related to the project, to any District employee or official or to any contracting consultant hired by the District for purposes of this project.
6. Reasonable efforts will be made to prevent disclosure of proprietary financial information submitted in response to this RFQ/P until and unless that person or entity is awarded the ground lease. The District shall not, however, be responsible under any circumstances for any damages or losses incurred by a respondent or any other person or entity because of the release of such financial information.
7. The District will not return submittals or any information submitted in connection with a submittal.
8. Designs, descriptions, images and other intellectual property (other than proprietary financial information regarding a respondent) submitted in connection with any response shall be deemed to be within the public domain, and no respondent or other person or entity shall

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have any proprietary right to such designs, descriptions, images and other intellectual property. Submissions of such designs, descriptions, images or other intellectual property shall be deemed an agreement by a respondent that the District or any other party may use such designs, descriptions, images or property in connection with the future development of the Property without restriction or compensation.

9. The District reserves the right to disqualify any respondent to this RFQ/P on the basis of any real or apparent conflict of interest that is disclosed by the responses submitted, or on the basis of other data available to the District. This disqualification is at the sole discretion of the District. Any false, incomplete, or otherwise unresponsive statements made in connection with a proposal may be cause for its disqualification at the District's discretion. Any judgment as to the significance of any falsity, incompleteness, or unresponsiveness associated with a proposal shall be within the sole discretion of the District, and its judgment shall be final.
10. The District intends, through exclusive negotiations, to identify the actions and activities that would be necessary to develop the site and thereby facilitate meaningful environmental review. If the project is found to cause significant adverse impacts that have not already been analyzed and/or have not been mitigated, the District retains absolute discretion to require additional environmental analysis, and to: (a) modify the project to mitigate significant adverse environmental impacts; (b) select feasible alternatives which avoid significant adverse impacts of the proposed project; or (c) determine not to proceed with the project as proposed. In no event shall the District have any liability to any respondent in connection with any such decision.
11. The developer shall be responsible for obtaining all approvals required for the development project, and the developer will be expected to pay all permit and processing fees related to the development.
12. The developer will be required to comply with all requirements in effect, including without limitation, Non-Discrimination in Contracts.
13. The District will not pay a Finder's or Broker's Fee in connection with this RFQ/P. Respondents shall be solely responsible for the payment of all fees to any real estate brokers(s) with whom such party has worked.
14. The selection of an affordable housing developer shall be in the sole discretion of the District. Modifications to, or the termination of, the selections process shall also be in the sole discretion of the District.
15. All expenses or liabilities incurred by a respondent in connection with this RFQ/P and any response to it shall be at the sole risk of the respondent, and the District shall not have any liability to any respondent or other party in connection with such expenses or liabilities.

### **Opening of Proposals and Release of Information**

All materials submitted to the District become public property and are subject to the applicable California disclosure regulations upon receipt. If respondent does not wish the District to disclose information in its proposal that respondent considers proprietary, respondent must identify and mark each page containing such information "proprietary" at time of submittal. The District will, to the extent allowed by law, endeavor to protect such information from disclosure. Failure to identify proprietary information will result in all unmarked sections being deemed non-proprietary and available upon public request.

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## **Confidentiality**

If a respondent believes that any portion of its proposal, response, specification or correspondence contains information that should be withheld as confidential, the District should be so advised in writing and provided with legal justification to support the confidentiality claim. A respondent shall request, in writing, nondisclosure of designated trade secrets or other proprietary data considered confidential by law. Such information shall accompany the proposal, be clearly marked, and be readily separable from the proposal in order to facilitate eventual public access of the non-confidential portion of the submittal,

Respondents may not mark an entire submittal as confidential. Should a qualifications submittal be marked in this manner, the District reserves the right to treat the entire proposal as non-confidential except as may be required by applicable law.

## **Responsibility of Respondents**

A respondent must, at the time of award, be compliant with all laws governing entities doing business in California, including, but not limited to: tax clearance, unemployment insurance, workers compensation, temporary disability insurance, prepaid health care, certificates of compliance, etc.