

File No. 250394

Committee Item No. 17

Board Item No. 22

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Committee Date April 30, 2025

Board of Supervisors Meeting Date May 6, 2025

Cmte Board

<input type="checkbox"/>	<input type="checkbox"/>	Motion
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Resolution
<input type="checkbox"/>	<input type="checkbox"/>	Ordinance
<input type="checkbox"/>	<input type="checkbox"/>	Legislative Digest
<input type="checkbox"/>	<input type="checkbox"/>	Budget and Legislative Analyst Report
<input type="checkbox"/>	<input type="checkbox"/>	Youth Commission Report
<input type="checkbox"/>	<input type="checkbox"/>	Introduction Form
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Department/Agency Cover Letter and/or Report
<input type="checkbox"/>	<input type="checkbox"/>	MOU
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Grant Information Form
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Grant Budget
<input type="checkbox"/>	<input type="checkbox"/>	Subcontract Budget
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Contract/Agreement
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Form 126 – Ethics Commission
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Award Letter
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Application
<input type="checkbox"/>	<input type="checkbox"/>	Public Correspondence

OTHER (Use back side if additional space is needed)

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<u>Program Guidelines 5/12/2021</u>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<u>Notice of Funding Availability 5/12/2021</u>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<u>Board Ordinance No. 142-20 8/28/2020</u>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<u>Board Resolution No. 421-21 9/24/2021</u>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<u>MOHCD Presentation 4/30/2025</u>
<input type="checkbox"/>	<input type="checkbox"/>	<u> </u>
<input type="checkbox"/>	<input type="checkbox"/>	<u> </u>
<input type="checkbox"/>	<input type="checkbox"/>	<u> </u>

Completed by: Brent Jalipa Date April 24, 2025

Completed by: Brent Jalipa Date May 1, 2025

1 [Execute Standard Agreement and Accept and Expend Grant - California Department of
2 Housing and Community Development - Infill Infrastructure Grant Program - Balboa Reservoir
3 Building E and Balboa Reservoir Building A - \$20,095,616]

4 **Resolution authorizing the Mayor's Office of Housing and Community Development**
5 **("MOHCD") to execute a Standard Agreement with California Department of Housing**
6 **and Community Development ("HCD") under the Infill Infrastructure Grant Program for**
7 **a total award of \$20,095,616 disbursed by HCD as a grant to the City for infrastructure**
8 **improvements related to property located at Balboa Reservoir Building E and Balboa**
9 **Reservoir Building A for 100% affordable housing projects ("Project") for the period**
10 **starting on the execution date of the Standard Agreement to June 30, 2030, and as**
11 **amended.**

12
13 WHEREAS, The State of California Department of Housing and Community
14 Development ("Department") issued a Notice of Funding Availability ("NOFA") dated May 12,
15 2021, under the Infill Infrastructure Grant Program ("IIG Program") established under
16 Division 31, Part 12.5 of the Public Resources Code commencing with Section 53559; and

17 WHEREAS, HCD is authorized to approve funding allocations for the IIG Program,
18 subject to the terms and conditions of the NOFA IIG Program Guidelines adopted by HCD on
19 May 12, 2021 ("Program Guidelines"), an application package released by HCD for the IIG
20 Program ("Application Package"), and an IIG standard agreement with the State of California
21 ("Standard Agreement"), and HCD is authorized to administer the approved funding
22 allocations of the IIG Program; and

23 WHEREAS, The IIG Program provides infrastructure for Capital Improvements Projects
24 in support of Qualifying Infill Projects or Qualifying Infill Areas to applicants identified through
25

1 a competitive process for the development of projects that, per the Program Guidelines,
2 support higher-density affordable and mixed-income housing and mixed-use infill
3 developments; and

4 WHEREAS, BHC Balboa Builders LLC, a California limited liability corporation
5 (“Developer”), has requested the City and County of San Francisco (the “City”), acting by and
6 through the Mayor’s Office of Housing and Community Development (“MOHCD”), to assist the
7 Developer with funding for infrastructure improvements for Balboa Reservoir (the “Qualifying
8 Infill Area”) related to the Properties for two affordable housing developments, including
9 approximately 287 units, pedestrian and open space improvements, bike lanes, and other
10 infrastructure construction (the “Project”) as part of the Balboa Reservoir Development
11 Agreement (Ordinance No. 142-20); and

12 WHEREAS, The Project is a Qualifying Infill Area under the IIG Program; and

13 WHEREAS, On August 18, 2020, by Ordinance No. 142-20, the Board of Supervisors
14 made findings under the California Environmental Quality Act (Public Resources Code
15 Sections 21000 et seq.) and findings of consistency with the General Plan, and the eight
16 priority policies of Planning Code, Section 101.1, which Ordinance is on file with the Clerk of
17 the Board of Supervisors in File No. 200423 and is incorporated herein by reference; and

18 WHEREAS, On September 14, 2021, the Board of Supervisors authorized MOHCD to
19 apply for IIG Program funds and submit an Application Package through Resolution No. 421-
20 21; and

21 WHEREAS, The grant terms prohibit including indirect costs in the grant budget; and

22 WHEREAS, Through an award letter dated November 6, 2024, HCD made an award in
23 the total amount of \$20,095,616 to be disbursed by HCD as a grant to the City for
24 infrastructure work as approved by HCD, subject to the terms and conditions of the Standard
25

1 Agreement, a copy of which is on file with the Clerk of the Board of Supervisors in File
2 No. 250394; now, therefore, be it

3 RESOLVED, That the Board of Supervisors approves and authorizes MOHCD to enter
4 into the Standard Agreement with HCD, with terms and conditions that IIG Program funds are
5 to be used for allowable capital asset project expenditures identified in Exhibit A; and, be it

6 FURTHER RESOLVED, That the Board of Supervisors hereby waives inclusion of
7 indirect costs in the grant budget; and, be it

8 FURTHER RESOLVED, That the Board of Supervisors authorizes the Director of
9 MOHCD (or his designee) to execute and deliver any documents in the name of MOHCD that
10 are necessary, appropriate or advisable to execute the Standard Agreement and to accept
11 and expend the IIG Program funds from HCD, and all amendments thereto, and complete the
12 transactions contemplated herein and to use the funds for eligible capital asset(s) in the
13 manner presented in the application as approved by HCD and in accordance with the NOFA
14 and Program Guidelines and Application Package; and, be it

15 FURTHER RESOLVED, That all actions authorized and directed by this Resolution and
16 heretofore taken are ratified, approved and confirmed by this Board of Supervisors; and, be it

17 FURTHER RESOLVED, That within thirty (30) days of the Standard Agreement being
18 fully executed by all parties, MOHCD shall provide the final agreement to the Clerk of the
19 Board for inclusion into the official file.
20
21
22
23
24
25

1 Recommended:

2
3 /s/
Daniel Adams, Director
4 Mayor's Office of Housing and Community Development

5 Approved:

6
7 /s/ Sophia Kittler
Daniel Lurie, Mayor

/s/ Jocelyn Quintos
Greg Wagner, Controller

File Number: 250394
(Provided by Clerk of Board of Supervisors)

Grant Resolution Information Form
(Effective July 2011)

Purpose: Accompanies proposed Board of Supervisors resolutions authorizing a Department to accept and expend grant funds.

The following describes the grant referred to in the accompanying resolution:

1. Grant Title: Infill Infrastructure Grant Program –Balboa Reservoir Buildings A and E

2. Department: Mayor's Office of Housing and Community Development

3. Contact Person: Benjamin McCloskey Telephone: 628-652-5956

4. Grant Approval Status (check one):

☒ Approved by funding agency

☐ Not yet approved

5. Amount of Grant Funding Approved or Applied for: \$20,095,616

6a. Matching Funds Required: \$0

b. Source(s) of matching funds (if applicable): N/A

7a. Grant Source Agency: California Department of Housing and Community Development

b. Grant Pass-Through Agency (if applicable): N/A

8. Proposed Grant Project Summary: Infrastructure improvements related to property located at Balboa Reservoir Building E and Balboa Reservoir Building A

9. Grant Project Schedule, as allowed in approval documents, or as proposed:

Start-Date: TBD

End-Date: 6/30/2030

10a. Amount budgeted for contractual services: N/A

b. Will contractual services be put out to bid? N/A

c. If so, will contract services help to further the goals of the Department's Local Business Enterprise (LBE) requirements? N/A

d. Is this likely to be a one-time or ongoing request for contracting out? N/A

11a. Does the budget include indirect costs? ☐ Yes ☒ No

b1. If yes, how much?

b2. How was the amount calculated?

c1. If no, why are indirect costs not included?

☒ Not allowed by granting agency

☐ To maximize use of grant funds on direct services

☐ Other (please explain):

c2. If no indirect costs are included, what would have been the indirect costs? N/A

12. Any other significant grant requirements or comments:

****Disability Access Checklist** (Department must forward a copy of all completed Grant Information Forms to the Mayor's Office of Disability)**

13. This Grant is intended for activities at (check all that apply):

- | | | |
|--|--|--|
| <input type="checkbox"/> Existing Site(s) | <input type="checkbox"/> Existing Structure(s) | <input type="checkbox"/> Existing Program(s) or Service(s) |
| <input type="checkbox"/> Rehabilitated Site(s) | <input type="checkbox"/> Rehabilitated Structure(s) | <input checked="" type="checkbox"/> New Program(s) or Service(s) |
| <input type="checkbox"/> New Site(s) | <input checked="" type="checkbox"/> New Structure(s) | |

14. The Departmental ADA Coordinator or the Mayor's Office on Disability have reviewed the proposal and concluded that the project as proposed will be in compliance with the Americans with Disabilities Act and all other Federal, State and local disability rights laws and regulations and will allow the full inclusion of persons with disabilities. These requirements include, but are not limited to:

1. Having staff trained in how to provide reasonable modifications in policies, practices and procedures;
2. Having auxiliary aids and services available in a timely manner in order to ensure communication access;
3. Ensuring that any service areas and related facilities open to the public are architecturally accessible and have been inspected and approved by the DPW Access Compliance Officer or the Mayor's Office on Disability Compliance Officers.

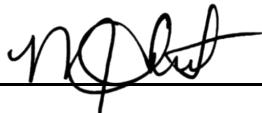
If such access would be technically infeasible, this is described in the comments section below:

Comments:

Departmental ADA Coordinator or Mayor's Office of Disability Reviewer:

Madeleine Sweet
(Name)

Compliance Coordinator – Data, Evaluation and Compliance
(Title)

Date Reviewed: 

2/21/2025
(Signature Required)

Department Head or Designee Approval of Grant Information Form:

Daniel Adams
(Name)

Director, Mayor's Office of Housing and Community Development
(Title)

Date Reviewed: 2/24/2025 | 11:41 AM PST

DocuSigned by:

(Signature Required)

1. This Agreement is entered into between the Contracting Agency and the Contractor named below:

CONTRACTING AGENCY NAME

Department of Housing and Community Development

CONTRACTOR'S NAME

City and County of San Francisco

2. The term of this Agreement is:

START DATE

Upon HCD Approval

THROUGH END DATE

06/30/2030

3. The maximum amount of this Agreement is:

\$20,095,616.00

4. The parties agree to comply with the terms and conditions of the following exhibits, which are by this reference made a part of the Agreement.

EXHIBITS	TITLE	PAGES
Exhibit A	Authority, Purpose and Scope of Work	4
Exhibit B	Budget Detail and Payment Provisions	3
Exhibit C*	State of California General Terms and Conditions	GTC - 04/2017
Exhibit D	IIG Terms and Conditions	15
Exhibit E	Special Conditions	11
TOTAL NUMBER OF PAGES ATTACHED		33

Items shown with an asterisk (*), are hereby incorporated by reference and made part of this agreement as if attached hereto.

These documents can be viewed at <https://www.dgs.ca.gov/OLS/Resources>

IN WITNESS WHEREOF, THIS AGREEMENT HAS BEEN EXECUTED BY THE PARTIES HERETO.

CONTRACTOR

CONTRACTOR NAME (if other than an individual, state whether a corporation, partnership,etc.)

City and County of San Francisco

CONTRACTOR BUSINESS ADDRESS

See Attached

CITY

See Attached

STATE

See Attached

ZIP

See Attached

PRINTED NAME OF PERSON SIGNING

See Attached

TITLE

See Attached

CONTRACTOR AUTHORIZED SIGNATURE

See Attached

DATE SIGNED

See Attached

STATE OF CALIFORNIA

CONTRACTING AGENCY NAME

Department of Housing and Community Development

CONTRACTING AGENCY ADDRESS

651 Bannon Street Suite 400

CITY

Sacramento

STATE

CA

ZIP

95811

PRINTED NAME OF PERSON SIGNING

TITLE

Contract Services Section Manager

CONTRACTING AGENCY AUTHORIZED SIGNATURE

DATE SIGNED

CONTRACTOR

City and County of San Francisco

a California public body, corporate, and politic

By: _____ Date: _____

Eric D. Shaw

Director, Mayor's Office of Housing and Community Development

Address:

1 South Van Ness Avenue, Fifth Floor. Attn: MOHCD
San Francisco, CA 94103

Prep Date: 01/30/2025

DRAFT

SCO ID:

☐ CHECK HERE IF ADDITIONAL PAGES ARE ATTACHED

1. CONTRACTOR'S NAME City and County of San Francisco		2. FEDERAL I.D. NUMBER N/A
3. AGENCY TRANSMITTING AGREEMENT Department of Housing and Community Development	4. DIVISION, BUREAU, OR OTHER UNIT Financial Assistance	5. AGENCY BILLING CODE N/A
6a.CONTRACT ANALYST NAME	6b. EMAIL	6c. PHONE NUMBER
7. HAS YOUR AGENCY CONTRACTED FOR THESE SERVICES BEFORE? <input checked="" type="checkbox"/> NO <input type="checkbox"/> YES (If Yes, enter prior contractor name and agreement number) <div>PRIOR CONTRACTOR NAME N/A</div> <div>PRIOR AGREEMENT NUMBER N/A</div>		

8. BRIEF DESCRIPTION OF SERVICES
To provide gap funding for qualified infrastructure improvement projects.

9. AGREEMENT OUTLINE (Include reason for Agreement: Identify specific problem, administrative requirement, program need or other circumstances making the Agreement necessary; include special or unusual terms and conditions.)
The Infill Infrastructure Grant Program (IIG) was funded by the Veterans and Affordable Housing Bond Act of 2018 (Proposition 1). The primary objective of the IIG program is to promote infill housing development by providing financial assistance for Capital Improvement Projects that are an integral part of or necessary to facilitate the development of infill housing developments.

10.PAYMENT TERMS (More than one may apply)

☐ Monthly Flat Rate ☐ Quarterly ☐ One-Time Payment ☒ Progress Payment

☐ Itemized Invoice ☐ Withhold 0% ☐ Advanced Payment Not To Exceed

☐ Reimbursement/Revenue \$ 0.00 or 0%

☐ Other (Explain)

11. PROJECTED EXPENDITURES					
FUND TITLE	ITEM	FISCAL YEAR	CHAPTER	STATUTE	PROJECTED EXPENDITURES
Regional Planning, Housing & Infill Incentive Acct	2240 103 6069 Cat.	2021/2022	21	2021	\$ 20,095,616.00
OBJECT CODE 22402000/49305 = \$20,095,616.00 5432000 - Grants and Subventions - Governmental			AGREEMENT TOTAL		\$ 20,095,616.00
OPTIONAL USE			AMOUNT ENCUMBERED BY THIS DOCUMENT		
			\$ 20,095,616.00		
I certify upon my own personal knowledge that the budgeted funds for the current budget year are available for the period and purpose of the expenditure stated above.			PRIOR AMOUNT ENCUMBERED FOR THIS AGREEMENT		
			\$ 0.00		
			TOTAL AMOUNT ENCUMBERED TO DATE		
			\$ 20,095,616.00		
ACCOUNTING OFFICER'S SIGNATURE		ACCOUNTING OFFICER'S NAME (Print or Type)		DATE SIGNED	

12. AGREEMENT

AGREEMENT	TERM FROM	TERM THROUGH	TOTAL COST OF THIS TRANSACTION	BID, SOLE SOURCE, EXEMPT
Original		06/30/2030	\$ 20,095,616.00	Exempt
Amendment No. 1				
Amendment No. 2				
Amendment No. 3				
		TOTAL	\$ 20,095,616.00	

13. BIDDING METHOD USED:

- ☐ Request for Proposal (RFP)(Attach justification if secondary method is used)
- ☐ Invitation for Bid (IFB)
- ☒ Other (Explain) SCM Vol 1, 5.80, B.2.b
- ☐ Use of Master Service Agreement
- ☒ Exempt from Bidding (Give authority for exempt status)
- ☐ Sole Source Contract(Attach STD. 821)

Note: Proof of advertisement in the State Contracts Register or an approved form STD.821, Contract Advertising Exemption Request, must be attached.

14. SUMMARY OF BIDS (List of bidders, bid amount and small business status) (If an amendment, sole source, or exempt, leave blank.)

15. IF AWARD OF AGREEMENT IS TO OTHER THAN THE LOWER BIDDER, PLEASE EXPLAIN REASON(S). (If an amendment, sole source, or exempt, leave blank.)

16. WHAT IS THE BASIS FOR DETERMINING THAT THE PRICE OR RATE IS REASONABLE?
N/A

17a. JUSTIFICATION FOR CONTRACTING OUT (Check one)

- ☐ Contracting out is based on cost savings per Government Code 19130(a). The State Personnel Board has been so notified.
- ☒ Not Applicable (Interagency / Public Works / Other _____)
- ☐ Contracting out is justified based on Government Code 19130(b). When this box is checked, a completed JUSTIFICATION - CALIFORNIA CODE OF REGULATIONS, TITLE 2, SECTION 54760 must be attached to this document.

17b. EMPLOYEE BARGAINING UNIT NOTIFICATION N/A

- ☐ By checking this box, I hereby certify compliance with Government Code section 19132(b)(1).

AUTHORIZED SIGNATURE N/A	SIGNER'S NAME (Print or Type) N/A	DATE SIGNED N/A
-----------------------------	--------------------------------------	--------------------

18. FOR AGREEMENTS IN EXCESS OF \$5,000: Has the letting of the agreement been reported to the Department of Fair Employment and Housing? ☐ No ☐ Yes ☒ N/A

19. HAVE CONFLICT OF INTEREST ISSUES BEEN IDENTIFIED AND RESOLVED AS REQUIRED BY THE STATE CONTRACT MANUAL SECTION 7.10? ☐ No ☐ Yes ☒ N/A

20. FOR CONSULTING AGREEMENTS: Did you review any contractor evaluations on file with the DGS Legal Office? ☐ No ☐ Yes ☒ N/A

21. IS A SIGNED COPY OF THE FOLLOWING FILE AT YOUR AGENCY FOR THIS CONTRACTOR?

- A. Contractor Certification Clauses
☐ No ☐ Yes ☒ N/A
- B. STD.204 Vendor Data Record
☐ No ☒ Yes ☐ N/A

22. REQUIRED RESOLUTIONS ARE ATTACHED
☐ No ☒ Yes ☐ N/A

23. IS THIS A SMALL BUSINESS AND/OR A DISABLED VETERAN BUSINESS CERTIFIED BY DGS?
☐ No ☐ Yes
SB/DVBE Certification Number:
N/A

24. ARE DISABLED VETERANS BUSINESS ENTERPRISE GOALS REQUIRED?

- (If an amendment, explain changes, if any)
N/A
- ☐ No (Explain Below)
- ☐ Yes _____ % of Agreement

25. IS THIS AGREEMENT (WITH AMENDMENTS) FOR A PERIOD OF TIME LONGER THAN THREE YEARS? ☐ No ☐ Yes (If Yes, provide justification below)
N/A

I certify that all copies of the referenced Agreement will conform to the original Agreement sent to the Department of General Services.

SIGNATURE	NAME/TITLE (Print or Type)	DATE SIGNED
	Contracts Office / Contracts Analyst	

AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

AGREEMENT NUMBER	AMENDMENT NUMBER
21-IIG-16857	

JUSTIFICATION - CALIFORNIA CODE OF REGULATIONS, TITLE 2, SECTION 547.60
In the space provided below, the undersigned authorized state representative documents, with specificity and detailed factual information, the reasons why the contract satisfies one or more of the conditions set forth in Government Code section 19130(b). Please specify the applicable subsection. Attach extra pages if necessary.

DRAFT

The undersigned represents that, based upon his or her personal knowledge, information or belief the above justification correctly reflects the reasons why the contract satisfies Government Code section 19130(b).

SIGNATURE	NAME/TITLE (Print or Type)	DATE SIGNED	
PHONE NUMBER	STREET ADDRESS		
EMAIL	CITY	STATE	ZIP



BALBOA RESERVOIR BUILDINGS E AND A

11 Frida Kahlo Way

BUDGET AND FINANCE
COMMITTEE

APRIL 30, 2025

MAYOR'S OFFICE OF HOUSING AND
COMMUNITY DEVELOPMENT

BALBOA RESERVOIR BUILDINGS E & A

Budget and Finance Committee – April 30, 2025

1

File #250392

Resolution authorizing execution of HCD Standard Agreement for AHSC award of \$29,585,486 (Building E)

2

File #250393

Resolution authorizing execution of HCD Standard Agreement for AHSC award of \$45,271,399 (Building A)

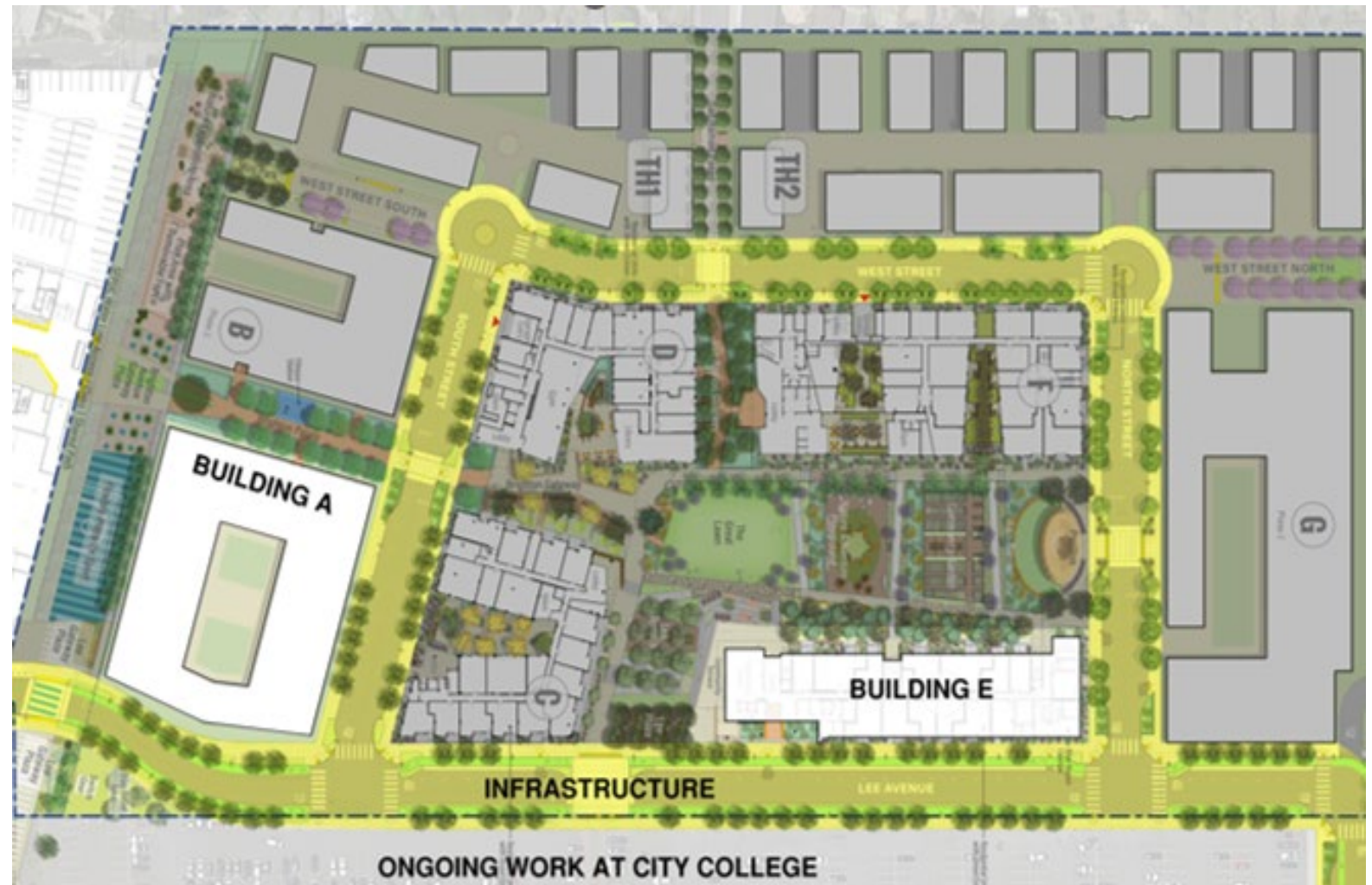
3

File #250394

Resolution authorizing execution of HCD Standard Agreement for IIG infrastructure award of up to \$20,095,616 (Buildings E & A)

BALBOA RESERVOIR

- 17-acre site located across from City College used as parking lot
- Development Agreement approved by BOS in August 2020
- Infrastructure for first two affordable buildings to start this summer





BALBOA RESERVOIR BUILDING E

- 1st 100% affordable development at Balboa Reservoir
- Development Sponsor is BRIDGE Housing
- 127 affordable units, one non-restricted manager's unit (128 total)
- 31 units at 40% AMI, 36 units at 65% AMI, 60 units at 80% AMI

FINANCING

- HCD Infill Infrastructure Grant (IIG) award up to \$20,095,616 to fund infrastructure for Building E and A
- HCD Affordable Housing Sustainable Communities (AHSC) award for \$29,585,486 with \$19,610,404 as a loan to Building E and \$9,975,082 for transportation improvements

TIMELINE

- Construction to begin October 2025
- Construction finish October 2027
- Lease up complete April 2028





BALBOA RESERVOIR BUILDING A

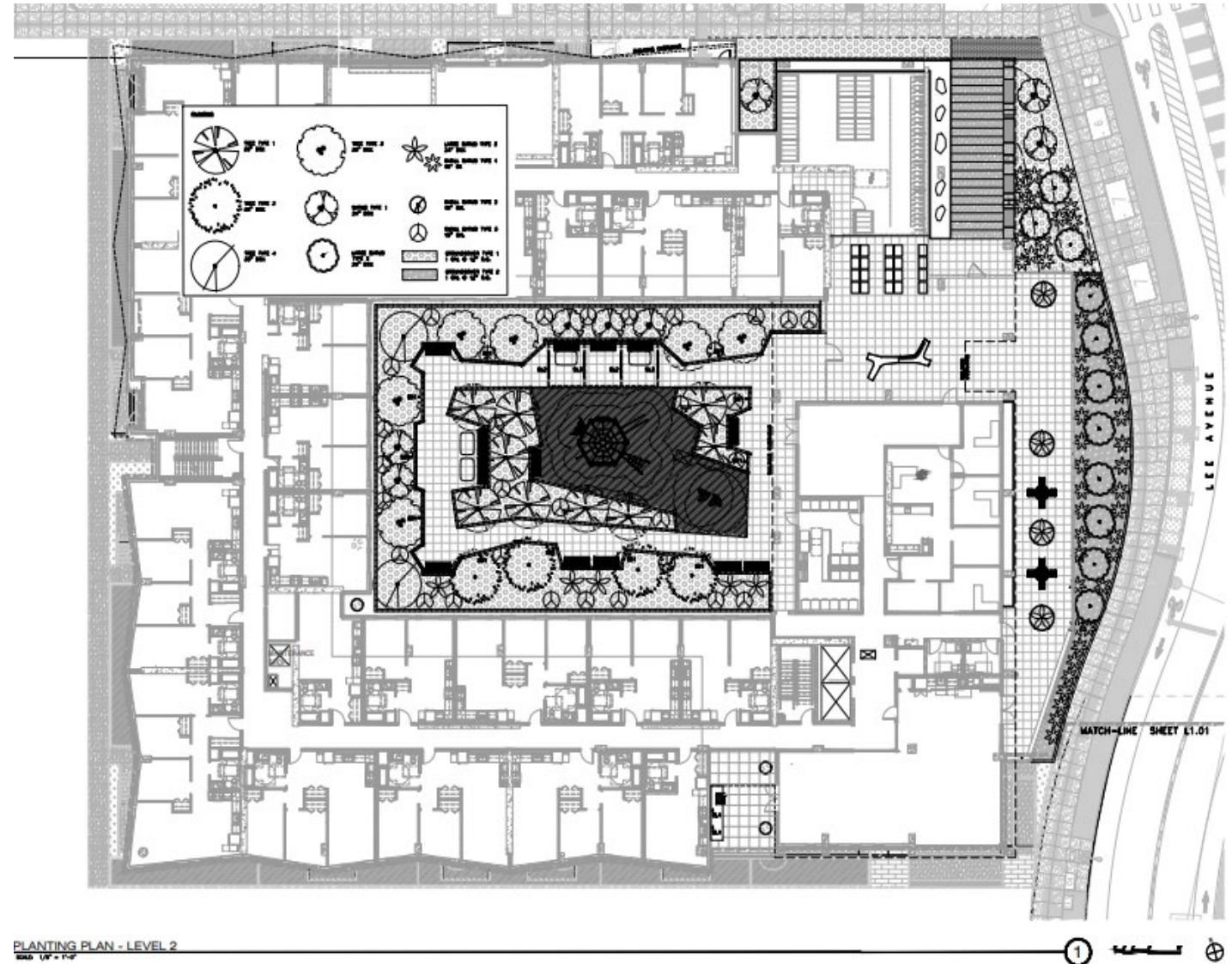
- 2nd 100% affordable development at Balboa Reservoir
- Development Sponsor is BRIDGE Housing
- 158 affordable units, one non-restricted manager's unit (159 total)
- 41 units at 40% AMI, 38 units at 70% AMI, 79 units at 80% AMI

FINANCING

- HCD Infill Infrastructure Grant (IIG) award up to \$20,095,616 to fund infrastructure for Building E and A
- HCD Affordable Housing Sustainable Communities (AHSC) award for \$45,721,399 with \$33,000,000 as a loan to Building A and \$12,721,399 for transportation improvements

TIMELINE

- Construction to begin January 2026
- Construction finish September 2027
- Lease up complete March 2028





Ryan VanZuylen, *Senior Project Manager*
Mayor's Office of Housing and Community
Development

Thank you!

HCD IIG Balboa Reservoir Expenditure Schedule

Proposed expenditures for the HCD IIG Balboa Reservoir Grant.

Agency Name	Project Description	HCD Funding Amount
City and County of San Francisco	Funds from the IIG Program will support site clearing, demolition, grading, street and transportation improvements, low pressure water system, a combined sewer system, stormwater management, and dry utility systems.	\$20,095,616

TOTAL HCD: \$20,095,616


**DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT
DIVISION OF STATE FINANCIAL ASSISTANCE**

2020 West El Camino Avenue, Suite 670, Sacramento, CA 95833
P. O. Box 952054, Sacramento, CA 94252-2054
(916) 263-2771



May 12, 2021

MEMORANDUM FOR: All Potential Applicants

FROM: Jennifer Seeger, Deputy Director
Division of State Financial Assistance 

SUBJECT: **Infill Infrastructure Grant Program
Round 7 Notice of Funding Availability**

The California Department of Housing and Community Development (HCD) is pleased to announce the initial release of Veterans and Affordable Housing Bond Act of 2018 (Proposition 1) Infill Infrastructure Grant program (IIG) funding for approximately \$160 million.

This Notice of Funding Availability (NOFA) will provide grants to for-profit or nonprofit developers, localities, or public agencies for Capital Improvement Projects in support of QIPs or Qualifying Infill Areas.

Application materials must be submitted electronically via the Financial Assistance Application Submittal Tool (FAAST) system, available online at <https://faast.waterboards.ca.gov/>, no later than **5:00 p.m. Pacific Daylight Time on July 12, 2021**. HCD will no longer accept hardcopy submittals.

The IIG Application, online workshop details, and guidelines will be posted on HCD's website <https://www.hcd.ca.gov/grants-funding/active-funding/iigp.shtml>. To receive information regarding online workshops and other updates, please subscribe to the IIG listserv http://www.hcd.ca.gov/HCD_SSI/subscribe-form.html

If you have further questions, please contact infill@hcd.ca.gov

Infill Infrastructure Grant Program
Round 7 Notice of Funding Availability



Gavin Newsom, Governor
State of California

Lourdes M. Castro Ramírez, Secretary
Business, Consumer Services and Housing Agency

Gustavo Velasquez, Director
California Department of Housing and Community Development

2020 West El Camino Avenue, Suite 500, Sacramento, CA 95833

Telephone: (916) 263-2771

Website: www.hcd.ca.gov/grants-funding/active-funding/iigp.shtml

Infill Infrastructure Grant Program

Email: infill@hcd.ca.gov

May 12, 2021

Table of Contents

I. Overview	1
A. Notice of Funding Availability (NOFA)	1
B. Timeline.....	1
C. What's new in this NOFA and Guidelines.....	1
D. Authorizing Legislation and Guidelines	3
II. Program requirements	4
A. Eligible Applicants are defined in Section 302 of the Guidelines.....	4
B. Eligible Projects.....	4
C. Eligible Costs	4
D. Program funding amounts and terms	4
E. Threshold	6
F. Selection criteria (rating and ranking).....	6
G. State requirements.....	8
III. Application submission and review procedures	8
A. Application submission process	8
B. Application workshops/webinar	8
C. Disclosure of Application	8
IV. Appeals.....	9
A. Basis of appeals	9
B. Appeal process and deadlines	9
C. Decision	9
V. Award announcements and contracts.....	10
A. Award announcements.....	10
B. Contracts.....	10
VI. Other state requirements	10
A. Relocation	10
B. State prevailing wages	11
C. Article XXXIV.....	11
VII. Other terms and conditions.....	11
A. Right to modify or suspend.....	11
B. Conflicts	11

I. Overview

A. Notice of Funding Availability (NOFA)

The California Department of Housing and Community Development (HCD) is pleased to announce the initial release of Veterans and Affordable Housing Bond Act of 2018 (Proposition 1) Infill Infrastructure Grant program (IIG) funding for approximately \$160 million. This Notice of Funding Availability (NOFA) will provide grants to for-profit or nonprofit developers, localities, or public agencies for Capital Improvement Projects in support of Qualifying Infill Projects (QIPs) or Qualifying Infill Areas (QIAs).

The primary objective of the IIG program is to promote infill housing development by providing financial assistance for Capital Improvement Projects that are an integral part of or necessary to facilitate the development of infill housing.

B. Timeline

Description	Date
NOFA Release	May 12, 2021
Application Due Date	July 12, 2021
Award Announcements	Early October 2021

C. What's new in this NOFA and Guidelines

Applications submitted under this NOFA are subject to the May 12, 2021 IIG program Guidelines (Guidelines). In this NOFA, policies and definitions are clarified to better align with legislative updates to the Health and Safety Code (HSC) and clarify programmatic goals, improve alignment with other state affordable housing and infrastructure funding programs, and respond to stakeholder feedback.

Noteworthy changes include:

1. NOFA

- To ensure the equitable use of Program funds, applicants seeking to substitute previously awarded funds must forfeit their prior award, in writing, prior to the Application due date without assurance of receiving a new award. This prohibition applies to funds awarded under any HCD program, including a prior IIG award.
- Geographic Targets have been updated to identify a percentage of program funds from this NOFA for communities in counties with a population of less than 250,000.

- Qualifying Infill Projects located in High or Highest Resource Areas (as specified on the TCAC/HCD Opportunity Area Maps <https://belonging.berkeley.edu/tcac-opportunity-map-2020>) will receive the maximum allowable 20 points (Access to Opportunity and Proximity to Amenities).

2. Section 302. Definitions

- Definitions of Bus Hub and Major Transit Stop were modified to make allowances for temporary schedule changes in response to COVID-19 related ridership reductions.
- Definition of Eligible Applicant no longer requires an Application for a QIP to include a Locality as an applicant.
- Definition of Enforceable Funding Commitment now allows for inclusion of both 4 and 9 percent tax credits.
- Only commitments for permanent financing are considered in the Application Selection Criteria.
- Definition of Locality is updated to include “the duly constituted governing body of an Indian reservation or rancheria that has jurisdiction over a QIA or a Tribally Designated Housing Entity.

3. Section 303. Eligible projects

- All Applications must include a QIP.

4. Section 303. Eligible costs

Internet infrastructure is identified as an Eligible Cost.

- Guidelines clarify that Eligible Costs for parking must meet the requirements set forth in the definition of Structured Parking.

5. Section 306. Performance requirements

- Recipients shall begin construction of the housing units not more than two years from the date of the Program award.
- Recipients shall complete construction of the housing units not more than three years from the date of the Program award.
- Program funds must be disbursed by the Program liquidation date of June 30, 2025. The Recipient must submit final disbursement requests no later than March 31, 2025.

Recipients may request an extension of performance requirements set forth in Section 306 by addressing a letter to the IIG Program Manager detailing the circumstances surrounding the extension request and detailing a plan for meeting the extended performance deadline. An extension may be granted if the Recipient adequately demonstrates probability of adherence to the proposed plan. However, any proposed extension must fall within the Program's legislatively set disbursement deadlines.

6. Section 307. Application process

- The Universal Application and IIG Supplemental Application have been consolidated into a single IIG application to streamline the Application process and reduce applicant burden.
- Original "wet signature" documents are no longer required or accepted. The entire Application, including supporting documentation, will be submitted electronically.

7. Sections 309 and 310. Selection criteria

- Selection Criteria is based on commitments for permanent financing.
- Applications proposing 4 percent and 9 percent tax credits will be considered equally, allowing Applicants to choose the path that is most likely to fulfill project financing.
- The Selection Criteria for QIAs was brought into better alignment with Selection Criteria for QIPs to ensure a consistent approach to evaluating Applications.
- To incentivize larger scale residential developments, the Multiple QIPs criterion allows full points for QIAs that exceed 250 units.

D. Authorizing Legislation and Guidelines

The IIG program was established by Chapter 2 of Part 12 of Division 31 commencing with HSC section 53545.12.

Senate Bill 3 (SB 3) (Chapter 365, Statutes of 2017), which authorized the Veterans and Affordable Housing Bond Act of 2018 was adopted by voters on November 6, 2018, (Proposition 1) and authorizes the issuance of bonds in the amount of \$4 billion under the State General Obligation Bond Law. SB 3 allocates \$2.85 billion of the bond proceeds to fund housing programs administered by HCD. Specifically, SB 3 authorizes for the allocation of \$300 million of bond proceeds for IIG to promote infill housing development by providing financial assistance for Capital Improvement Projects that are an integral part of or necessary to facilitate the development of infill housing. This NOFA makes available the first round of IIG Proposition 1 funding.

Applications submitted under this NOFA are subject to the Guidelines, all applicable statutory requirements, and this NOFA. Section references in this NOFA refer to the Guidelines unless otherwise noted. Capitalized terms in this NOFA are either defined herein or in the Guidelines. The Guidelines and NOFA are available at HCD's www.hcd.ca.gov/grants-funding/active-funding/iigp.shtml.

II. Program requirements

A. Eligible Applicants are defined in Section 302 of the Guidelines.

B. Eligible Projects

To be eligible for funding, a Capital Improvement Project must be an integral part of, or necessary to facilitate the development of the QIP(s).

Eligible projects must meet the requirements set forth in Section 303 of the Guidelines.

C. Eligible Costs

Eligible Costs are described in Section 304 of the Guidelines.

D. Program funding amounts and terms

For a QIP, the minimum program grant award is \$1 million in urban areas and \$500,000 in Rural Areas. The total program grant award to any QIP is limited to \$7.5 million under this NOFA.

For QIAs, the minimum program grant award is \$2 million in urban areas and \$1 million in Rural Areas. The total program grant award to any eligible QIA is limited to \$30 million under this NOFA.

Over the life of the Program, to include IIG of 2007 program, IIG of 2019 program, and any future iterations of the program, the total of all program funds awarded to any single QIP or QIA shall not exceed \$60 million.

Pursuant to Section 305 of the Guidelines, the total grant amount shall be determined by the number of units in the QIP or QIA, the bedroom count of these units, and the density and affordability of the housing to be developed. (See the Grant Amount Calculation table below.) Additional requirements are set forth in Section 305 of the Guidelines.

Grant Amount Calculation (amounts are represented on a per unit basis)					
Income Level & Tenure	0-Bdrm	1-Bdrm	2-Bdrm	3-Bdrm	4-Bdrm
200%+ FMR ¹ or Exceeds CalHFA Sales Prices	\$3,700	\$7,400	\$11,100	\$14,800	\$18,500
Program Unrestricted ²	\$24,700	\$28,400	\$33,000	\$40,800	\$44,500
Moderate-Income Owner	\$28,400	\$32,100	\$38,300	\$45,700	\$49,400
Low-Income Owner	\$32,100	\$35,800	\$43,200	\$50,600	\$55,600
60% AMI Rental	\$32,100	\$35,800	\$43,200	\$50,600	\$55,600
50% AMI Rental	\$37,100	\$42,000	\$48,200	\$58,000	\$61,800
30% AMI Rental	\$43,200	\$45,700	\$51,900	\$66,700	\$70,400

Grant amounts established by the Grant Amount Calculation table may be increased based on proposed housing units per acre, as represented in the following Net Density Adjustment Factor chart below.

Net Density Adjustment Factor	
Net Density (housing units per acre)	Adjustment Factor
Fewer than 30	1
30 – 34.9	1.04
35 – 39.9	1.08
40 – 44.9	1.12
45 – 49.9	1.16
50 – 54.9	1.20
55 – 59.9	1.24
60 – 64.9	1.28
65 – 69.9	1.32
70 – 74.9	1.36
75 – 79.9	1.40
80 – 89.9	1.44
90 – 99.9	1.48
100 and above	1.52

¹ 200% Fair Market Rent (FMR) Unit: A 200 percent FMR Unit is a rental unit with a proposed monthly rent, which is equal to or greater than 200 percent of its county's FMR as defined by HUD.

² IIG Unrestricted: An unrestricted unit for the purposes of calculating grant amounts in the IIG program is any unit not restricted at the other levels identified in Section 302(a), but also not meeting any of the above definitions. *Increase based on December Consumer Price Index per U.S. Bureau of Labor Statistics
https://data.bls.gov/pdq/SurveyOutputServlet?data_tool=dropmap&series_id=CUUR0400SA0,CUUS0400SA0

E. Threshold

In addition to meeting the requirements described herein and set forth in Section 308 of the Guidelines, Applicants must meet the program threshold and eligibility requirements throughout the Guidelines and Application.

Please Note: Applicants seeking to substitute previously awarded funds must forfeit their prior award, in writing, prior to the Application due date without assurance of receiving a new award, including funds awarded under any HCD program, or prior IIG award.

F. Selection criteria (rating and ranking)

QIP Applications shall be rated based on the criteria set forth in Section 309 of the Guidelines.

QIA Applications shall be rated based on the criteria set forth in Section 310 of the Guidelines.

In the event two or more Applications have the same score, the following tie-breaker points will be awarded, in the following order of priority, until there is no longer a tie:

- Ten tie-breaker points will be awarded to the QIP or QIA having the lowest ratio between the requested grant amount to the total allowable maximum grant amount in accordance with the maximum calculated grant amount through the respective program Guidelines. All such ratios will be rounded to the nearest second decimal place.
- An additional three tie-breaker points will be awarded to the QIP or QIA for each previously awarded QIP developed by the Eligible Applicant that has received a certificate of occupancy by the deadline for submittal of Applications set forth in this NOFA.

To be considered for funding, project Applications must receive a **minimum score of 210**, excluding tie-breaker points.

Applications must include a completed IIG self-scoring worksheet along with documentation acceptable to HCD that adequately supports the self-score provided. Applications that do not include a completed self-scoring worksheet will not be considered for funding. No additional information may be added to an Application after it has been submitted (except where expressly allowed in the Guidelines).

IIG's enabling statute requires HCD to "ensure a reasonable geographic distribution of funds" (HSC section 53545.13). To the extent possible, the highest-ranking projects will be selected for award from each of the following targets:

- Target 45 percent of total funds to projects located in Southern California (Kern, Los Angeles, Orange, Riverside, San Bernardino, San Diego, San Luis Obispo, Santa Barbara, and Ventura counties);
- Target 10 percent of total funds to projects located in the Central Valley (Fresno, Merced, San Joaquin, Stanislaus, and Tulare counties);
- Target 25 percent of total funds to projects located in Northern California (Alameda, Contra Costa, Marin, Monterey, Placer, Sacramento, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma, and Sutter counties)
- Target 10 percent of total funds to projects located in counties having fewer than 250,000 residents (Alpine, Amador, Butte, Calaveras, Colusa, Del Norte, El Dorado, Glenn, Humboldt, Imperial, Inyo, Kings, Lake, Lassen, Madera, Mariposa, Mendocino, Modoc, Mono, Napa, Nevada, Plumas, San Benito, Shasta, Sierra, Siskiyou, Tehama, Trinity, Tuolumne, Yolo, and Yuba counties).

The highest scoring Applications that meet all eligibility and threshold requirements will be funded in descending order within each of the geographic targets.

Of the total funds available under the NOFA, HCD shall target 10 percent of total funds, to the extent there are eligible applications, to the following:

- Emerging Developers: An Applicant where the ownership structure consists of a majority of persons that have been historically disadvantaged due to express or implicit systemic bias or prejudice which may be demonstrated by meeting definition of “BIPOC” and “BIPOC Project” as set forth in Chapter 2, Article 1, Section 5170 of the California Debt Limit Allocation Regulations (adopted April 28, 2021).
- Federally Recognized and Special Government Entities and Properties: An Applicant that is any of the following:
 - (i) It meets the definition of Indian tribe under Section 4103 of Title 25 of the United State Code (means any Indian tribe, band, nation, or other organized group or community of Indians that is recognized as eligible for the special programs and services provided by the United States to Indians because of their status as Indians pursuant to the Indian Self-Determination and Education Assistance Act (25 U.S.C. 450 et seq.). 25 USC 4103(13)(B);
 - (ii) If not a federally recognized tribe, either
 - a. It is listed in the Bureau of Indian Affairs Office of Federal Acknowledgement petitioner list pursuant to Section 82.1 of Title 25 of the Federal Code of Regulations. ([Office of Federal Acknowledgment \(OFA\) | Indian Affairs \(bia.gov\)](#))
 - b. It is a Indian tribe located in California that is on the contact list maintained by the Native American Heritage Commission for the purposes of consultation pursuant to Section 65352.3 of the

Government Code; and proposes a project on land that satisfies the following:

- (1) Located in Indian country as defined by 18 USC 1151, or
- (2) Located on fee land.

G. State requirements

Compliance with California's Housing Element Law

The QIP/QIA must be located in a Locality that has an adopted Housing Element that has been found by HCD to be in substantial compliance with the requirements of Article 10.6 (commencing with Section 65580) of Chapter 3 of Division 1 of Title 7 of the Government Code. Housing Element compliance must be established as of the NOFA Application submittal deadline date.

Housing Element compliance status is available on HCD's website at <https://www.hcd.ca.gov/community-development/housing-element/docs/status.pdf>.

III. Application submission and review procedures

A. Application submission process

Application materials must be submitted electronically via the Financial Assistance Application Submittal Tool (FAAST) system <https://faast.waterboards.ca.gov/>.

Original "wet signature" documents are no longer required or accepted.

Applicants must submit all Application materials to the FAAST system no later than 5:00 p.m. Pacific Daylight Time on, July 12, 2021. Applications that do not meet the filing deadline requirements will not be eligible for funding.

Applications must be on HCD's forms and cannot be altered or modified by the Applicant. Excel forms must be in Excel format, not a PDF document. Applications must meet all eligibility requirements upon submission (except as expressly indicated in the Guidelines). Applications with material internal inconsistencies will not be rated and ranked. It is the Applicant's responsibility to ensure that the Application is clear, complete, and accurate. Program staff may request clarifying information.

B. Application workshops/webinar

HCD will conduct two Application webinars. Please visit <https://www.hcd.ca.gov/grants-funding/active-funding/iigp.shtml> on the program website for the dates and registration information.

C. Disclosure of Application

Information provided in the Application will become a public record available for review by the public, pursuant to the California Public Records Act (Act) (Chapter 1473, Statutes 1968). As such, any materials provided will be disclosable

to any person making a request under this Act and will be made publicly available through the FAAST electronic portal. HCD cautions Applicants to use discretion in providing information not specifically requested, including but not limited to, bank account numbers, personal phone numbers, and home addresses. By providing this information to HCD, the Applicant is waiving any claim of confidentiality and consents to the disclosure of submitted material upon request.

IV. Appeals

A. Basis of appeals

1. Upon receipt of HCD's notice that an Application has been determined to be incomplete, ineligible, has fail threshold review, or has a reduction to the self-score, Applicants under this NOFA may appeal such decision(s) to HCD pursuant to this section.
2. No Applicant shall have the right to appeal a decision of HCD relating to another Applicant's eligibility, point score, award, denial of award, or any other matter related thereto.
3. The appeal process provided herein applies solely to the decision of HCD made in this program NOFA and does not apply to any decisions made with respect to any previously issued NOFAs or decisions to be made pursuant to future program NOFAs.

B. Appeal process and deadlines

1. To file an appeal, Applicants must submit to HCD a written request, which states all relevant facts, arguments, and evidence upon which the appeal is based. Furthermore, the Applicant must provide a detailed reference to the area or areas of the Application that provide clarification and substantiation for the basis of the appeal. No new or additional information will be considered if this information would result in a competitive advantage to an Applicant. Once the written appeal is submitted to HCD, no further information of materials will be accepted or considered thereafter. Appeals are to be submitted to HCD at infill@hcd.ca.gov according to the deadline set forth in HCD review letters.
2. Appeals must be received by HCD no later than five (5) business days from the date of HCD's threshold review, or initial score letters, representing HCD's decision made in response to the Application.

C. Decision

Any request to appeal HCD's decision regarding an Application shall be reviewed for compliance with this NOFA and the Guidelines. All decisions rendered shall be final, binding, and conclusive, and shall constitute the final action of HCD.

V. Award announcements and contracts

A. Award announcements

HCD will announce program awards on the IIG website: www.hcd.ca.gov/grants-funding/active-funding/iigp.shtml#awarded

B. Contracts

Successful Applicants (Recipient) will enter into one or more Standard Agreements with HCD. The Standard Agreement contains relevant terms and conditions for funding of the award.

VI. Other state requirements

A. Relocation

Both the Applicant and HCD must comply with applicable Relocation Law, which is detailed pursuant to Government Code section 7260 et seq., the California Code of Regulations, title 25, section 6000 et seq., federal law, if applicable (depending on project financing), 49 Code of Federal Regulations Part 24 of the Uniform Relocation Assistance and Real Property Acquisition for Federal and Federally Assisted Programs (URA) (collectively referred to herein forth as “Relocation” or “Relocation Law”).

Relocation Law provides important protections and assistance for displaced persons and entities affected by the acquisition, rehabilitation, or demolition of real property for government-funded projects. Relocation Law ensures that those displaced individuals and entities whose real property is acquired, or who move (even if temporarily) as a direct result of projects receiving government funds, are treated fairly and equitably and receive assistance in moving from the property they occupy. HCD seeks to ensure that displaced persons, which includes tenants, businesses, and homeowners, do not suffer disproportionately as a result of programs designed for the benefit of the public as a whole.

At the NOFA Application stage, it is too premature to conduct a detailed Relocation review. At this stage, HCD only confirms that Relocation expenses are properly budgeted. Due to the importance of satisfying Relocation Law, the Applicant is encouraged to employ the services of a Relocation consultant to procure a good faith estimate of the potential Relocation cost, which may, or may not, necessitate a Relocation plan. HCD has found that the services of a professional Relocation consultant may save a Recipient money and time in the loan process.

The importance of satisfying Relocation Law cannot be understated. Failure to follow the Relocation Law requirements will result in the project not being funded by HCD. Applicants cannot circumvent Relocation Law to avoid Relocation payment assistance by simply not renewing leases, which is not permissible under Relocation Law. At the construction loan close stage, HCD will notify all lenders that failure to satisfy Relocation Law, particularly the improper displacement of individuals or entities, could jeopardize HCD funding.

B. State prevailing wages

Program funds awarded under this NOFA are subject to state prevailing wage law, as set forth in Labor Code section 1720 et seq. and require the payment of prevailing wages unless the project meets one of the exceptions of Labor Code section 1720 (c) as determined by the Department of Industrial Relations. Applicants are urged to seek professional advice as to how to comply with State prevailing wage law.

C. Article XXXIV

IIG program funds are not subject to Article XXXIV, section 1 of the California Constitution, as clarified by the Public Housing Election Implementation Law (HSC sections 37000 - 37002). The IIG program funds do not directly fund the housing units, but rather fund the infrastructure that supports the housing units. Other HCD funding sources may require Article XXXIV compliance.

VII. Other terms and conditions

A. Right to modify or suspend

HCD reserves the right, at its sole discretion, to suspend, amend, or modify the provisions of this NOFA at any time, including without limitation, the amount of funds available hereunder. If such an action occurs, HCD will notify interested parties and will post the revisions to HCD's website. Subscriptions to HCD's email list are available at: www.hcd.ca.gov/hcd_ssi/subscribe-form.html

B. Conflicts

In the event of any conflict between the terms of this NOFA and either applicable state or federal law or regulation, the terms of the applicable state or federal law or regulation shall control. Applicants are deemed to have fully read and understand all applicable state and federal laws, regulations, and guidelines pertaining to the IIG program, and understand and agree that HCD shall not be responsible for any errors or omissions in the preparation of this NOFA.

Infill Infrastructure Grant Program

Guidelines



**Gavin Newsom, Governor
State of California**

**Lourdes M. Castro Ramírez, Secretary
Business, Consumer Services and Housing Agency**

**Gustavo Velasquez, Director
California Department of Housing and Community Development**

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May 12, 2021

Contents

ARTICLE 1. GENERAL	1
Section 300. Purpose and scope	1
Section 301. Program overview	1
Section 302. Definitions	1
ARTICLE 2. PROGRAM REQUIREMENTS	9
Section 303. Eligible projects	9
Section 304. Eligible costs	11
Section 305. Grant terms and limits	13
Section 306. Performance requirements	14
ARTICLE 3. APPLICATION PROCEDURES	16
Section 307. Application process	16
Section 308. Application threshold requirements	16
Section 309. Selection Criteria for Qualifying Infill Projects	17
Section 310. Selection criteria for Qualifying Infill Areas	26
ARTICLE 4. PROGRAM OPERATIONS	36
Section 311. Legal documents	36
Section 312. Reporting requirements	37
Section 313. Defaults and cancellations	38
Section 314. Prevailing Wages	38

ARTICLE 1. GENERAL

Section 300. Purpose and scope

The purpose of these Infill Infrastructure Grant program Guidelines (Guidelines) is to implement and interpret Chapter 2 of Part 12 of Division 31 commencing with Health and Safety Code section 53545.13, which establishes the Infill Incentive Grant Program of 2007, hereinafter referred to as the Infill Infrastructure Grant Program (IIG or Program).

Section 301. Program overview

The Program's primary objective is to promote infill housing development by providing financial assistance for Capital Improvement Projects that are an integral part of or necessary to facilitate the development of a Qualifying Infill Project or a Qualifying Infill Area.

Under the Program, grants are available as gap funding for infrastructure improvements necessary for specific residential or mixed-use infill development Projects or Areas. Both Infill Projects and Areas must have either been previously developed or be largely surrounded by development. Eligible improvements include development or rehabilitation of Parks or Open Space, water, sewer or other utility service improvements, streets, roads, parking structures, transit linkages, transit shelters, traffic mitigation features, sidewalks, and streetscape improvements.

Funds will be allocated through a competitive process, based on the merits of the individual Infill Projects and Areas. The application selection criteria includes project readiness, affordability, housing density, access to transit, proximity to amenities, and consistency with regional plans.

The Uniform Multifamily Regulations (UMRs) in Title 25, Division 1, Chapter 7, Subchapter 19 (commencing with section 8300) of the California Code of Regulations are hereby incorporated into these Guidelines. In the event of a conflict between the UMRs and these Guidelines, the provisions of these Guidelines shall prevail.

Section 302. Definitions

The following definitions apply to the capitalized terms used in these Guidelines:

- (a) "Affirmatively Furthering Fair Housing" means taking meaningful actions, in addition to combating discrimination, that overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to opportunity based on protected characteristics. Specifically, Affirmatively Furthering Fair Housing means taking meaningful actions that, taken together, address significant disparities in housing needs and in access to opportunity, replacing segregated living patterns with truly integrated and balanced living patterns, transforming racially and ethnically concentrated areas of poverty into areas of opportunity, and fostering and maintaining compliance with civil rights and fair housing laws. The duty to affirmatively further fair housing extends to all of a

public agency's activities and programs relating to housing and community development.

- (b) "Affordable Unit" means a unit that is made available at an affordable rent, as defined in Health and Safety Code section 50053, to a household earning no more than 60 percent of the Area Median Income (AMI) or, for ownership projects, at an affordable housing cost, as defined in Health and Safety Code section 50052.5, to a household earning no more than 120 percent of the AMI. Rental units shall be subject to a recorded covenant ensuring affordability for a duration of at least 55 years. Ownership units shall initially be sold to and occupied by a qualified household and shall be subject to a recorded covenant that includes either a resale restriction for at least 30 years or equity sharing upon resale.
- (c) "Area Median Income" or "AMI" means the most recent applicable county median family income published by the California Tax Credit Allocation Committee (TCAC).
- (d) "Bus Hub" means an intersection of three or more bus routes, where one route or a combination of routes has a minimum scheduled headway of ten minutes or at least six buses per hour during peak hours. Peak hours are limited to the time between 7 a.m. to 10 a.m., inclusive, and 3 p.m. to 7 p.m., inclusive, Monday through Friday, or the alternative peak hours designated for the transportation corridor by the transit agency. This level of service must have been publicly posted by the provider at some point between January 2020 and the time of application.
- (e) "Bus Transfer Station" means an arrival, departure, or transfer point for the area's intercity, intraregional, or interregional bus service having a permanent investment in multiple bus docking facilities, ticketing services, and passenger shelters.
- (f) "Capital Asset" means a tangible physical property with an expected useful life of 15 years or more. "Capital Asset" also means a tangible physical property with an expected useful life of 10 to 15 years for costs not to exceed 10 percent of the Program grant. "Capital Asset" includes major maintenance, reconstruction, demolition for purposes of reconstruction of facilities, and retrofitting work that is ordinarily done no more often than once every 5 to 15 years or expenditures that continue or enhance the useful life of the Capital Asset. "Capital Asset" also includes equipment with an expected useful life of two years or more. Costs allowable under this definition include costs incidentally but directly related to construction or acquisition, including, but not limited to, planning, engineering, construction management, architectural, and other design work, environmental impact reports and assessments, required mitigation expenses, appraisals, legal expenses, site acquisitions, and necessary easements.
- (g) "Capital Improvement Project" or "Project" means the construction, rehabilitation, demolition, relocation, preservation, acquisition, or other physical improvement of a Capital Asset that is an integral part of, or necessary to facilitate the

development of, a Qualifying Infill Project or Qualifying Infill Area. Capital Improvement Projects that may be funded under the Program include, but are not limited to, those described in Section 304 (a).

- (h) "CCR" means the California Code of Regulations.
- (i) "Department" means the California Department of Housing and Community Development.
- (j) "Developer" means an Eligible Applicant that the Department may rely upon for Site Control of either the Qualifying Infill Project or the Qualifying Infill Area.
- (k) "Eligible Applicant" means one of, or any combination of, the following:
 - (1) A nonprofit or for-profit Developer of a Qualifying Infill Project;
 - (2) A city, county, city and county, public housing authority, or redevelopment agency and/or successor agencies that have jurisdiction over a Qualifying Infill Area;
 - (3) A city, county, city and county, public housing authority, or redevelopment agency and/or successor agencies that has jurisdiction over a Qualifying Infill Area applying jointly with an "owners' association," as defined in the Streets and Highways Code section 36612 for a business or property improvement district that includes the Qualifying Infill Area;
 - (4) The duly constituted governing body of an Indian reservation or rancheria that has jurisdiction over a Qualifying Infill Area or a Tribally Designated Housing Entity that is the Developer of a Qualifying Infill Project.
- (l) "Employment Center" means a locally recognized concentration of employment opportunities practically available to the residents of the proposed Qualifying Infill Project, such as a large hospital, industrial park, commercial district, or office area.
- (m) "Enforceable Funding Commitment" means commitments for permanent financing, including, but not limited to, the following:
 - (1) Low-income housing tax credit equity and tax-exempt bonds in connection with 4 percent and 9 percent low-income housing tax credits evidenced by a tax credit reservation letter from TCAC.
 - (2) Funds awarded by another Department program. Proof of award must be received by the Department prior to final rating and ranking of the Program application.
 - (3) A land donation in fee for no other consideration that is supported by an appraisal and/or purchase/sale agreement, or some other instrument of title transfer ("Land Donation"), or a local fee waiver resulting in

quantifiable cost savings for the Project where those fee waivers are not otherwise required by federal or state law ("Local Fee Waiver"), shall be considered a funding commitment. The value of the Land Donation will be the greater of either the original purchase price or the current appraised value as supported by an independent third-party appraisal prepared by a Member Appraisal Institute-qualified appraiser within one year prior to the application deadline. A funding commitment in the form of a Local Fee Waiver must be supported by written documentation from the local public agency. A below market lease for at least 55 years that meets the requirements of UMR section 8316 would be considered a land donation (\$1 per year).

- (4) Owner equity contributions or developer funds. Such contributions or funds shall not be subsequently substituted with a different funding source or forgone if committed in the application, except that a substitution may be made for up to 50 percent of the deferred developer fee. The Department may require the Applicant to evidence the availability of the proposed amount of owner equity or developer funds.
- (5) Funds for transportation projects which are programmed for allocation and expenditure in the applicable Project plan consistent with the terms and timeframes of the Standard Agreement.
- (n) "Local Support" means support of local public agencies.
- (o) "Locality" means a California city, county, or city and county, or the duly constituted governing body of an Indian reservation or rancheria that has jurisdiction over a Qualifying Infill Area or a Tribally Designated Housing Entity.
- (p) "Lower-Income" has the meaning set forth in Health and Safety Code section 50079.5.
- (q) "Major Transit Stop" means a site containing any of the following: (1) An existing rail or bus rapid transit station. (2) A ferry terminal served by either a bus or rail transit service. (3) The intersection of two or more major bus routes with a frequency of service interval of 15 minutes or less during peak hours. Peak hours are limited to the time between 7 a.m. to 10 a.m., inclusive, and 3 p.m. to 7 p.m., inclusive, Monday through Friday, or the alternative peak hours designated for the transportation corridor by the transit agency. This level of service must have been publicly posted by the provider at some point between January 2020 and the time of application.
- (r) "Master Development" means the proposed residential units within the Qualifying Infill Project(s) or Qualifying Infill Area identified in the Program application.
- (s) "Moderate-Income" has the meaning set forth in Health and Safety Code section 50093.

- (t) “MHP” shall mean the Multifamily Housing Program authorized and governed by Health and Safety Code sections 50675 through 50675.14 and the Multifamily Housing Program Guidelines.
- (u) “Net Density” means the total number of dwelling units per acre of land to be developed for residential or mixed use, excluding allowed deductible areas. Allowed deductible areas are public dedications of land which are for public streets, public sidewalks, public Open Space, and public drainage facilities. Non-allowed deductible areas include utility easements, setbacks, private drives and walkways, general landscaping, common areas and facilities, off street parking, and traditional drainage facilities exclusive to a development project. Mitigations required for development will not be included in the allowed deductible areas.
- (v) “NOFA” means a Notice of Funding Availability for the Program issued by the Department.
- (w) “Nondiscretionary Local Approval Process” means a process for development approval involving little or no personal judgment by the public official as to the wisdom or manner of carrying out the project. The public official merely ensures that the proposed development meets all the objective zoning standards, objective subdivision standards, and objective design review standards in effect at the time that the application is submitted to the local government, but uses no special discretion or judgment in reaching a decision.
- (x) “Open Space” means a parcel or area of land or water that is essentially unimproved and dedicated to one or more of the following purposes: (1) the preservation of natural resources; (2) the managed production of resources; (3) public and/or residential outdoor recreation; or (4) public health and safety.
- (y) “Park” means a facility that provides benefits to the community and includes, but is not limited to, places for organized team sports, outdoor recreation, and informal turf play; nonmotorized recreational trails; permanent play structures; landscaping; community gardens; places for passive recreation; multipurpose structures designed to meet the special recreational, educational, vocational, and social needs of youth, Senior Citizens, and other population groups; recreation areas created by the redesign and retrofit of urban freeways; community swim centers; regional recreational trails; and infrastructure and other improvements that support these facilities.
- (z) “Program” means the Infill Infrastructure Grant Program as implemented by these Guidelines.
- (aa) “Qualifying Infill Area” means an area designated in the Program application that is a contiguous area located within an Urbanized Area (1) that has been previously developed, or where at least 75 percent of the perimeter of the area adjoins parcels that are developed with Urban Uses, and (2) in which at least one development application has been approved or is pending approval for a residential or mixed-use residential project that meets the definition and criteria in this Section for a Qualifying Infill Project.

- (bb) "Qualifying Infill Project" means a residential or mixed-use residential development project designated in the Program application that is located within an Urbanized Area on a site that has been previously developed, or on a vacant site where at least 75 percent of the perimeter of the site adjoins parcels that are developed with Urban Uses. A property is adjoining the side of a project site if the property is separated from the project site only by an improved public right-of-way.
- (cc) "Recipient" means the Eligible Applicant receiving a commitment of Program funds for an approved Capital Improvement Project.
- (dd) "Retail Center" means a downtown area or recognized neighborhood or regional shopping mall.
- (ee) "Rural Area" has the meaning set forth in Health and Safety Code section 50199.21.
- (ff) "Senior Citizen" or "Senior" means a person 62 years of age or older, or 55 years of age or older in a Senior Citizen housing development.
- (gg) "Site Control" means the Eligible Applicant and/or Developer has sufficient control of the property through one or more of the following:
 - (1) A fee title;
 - (2) A leasehold interest on the property with provisions that enable the lessee to make improvements on and encumber the property provided that the terms and conditions of any proposed lease shall permit, prior to grant funding, compliance with all Program requirements;
 - (3) An enforceable option to purchase or lease which shall extend through the anticipated date of the Program award as specified in the NOFA;
 - (4) An executed disposition and development agreement, or irrevocable offer of dedication to a public agency;
 - (5) A right of way or easement, which is either perpetual, or of sufficient duration to meet Program requirements, and which allows the Eligible Applicant and/or Developer to access, improve, occupy, use, maintain, repair, and alter the property underlying the right of way or easement;
 - (6) An executed encroachment permit for construction of improvements or facilities within the public right of way or on public land;
 - (7) An executed agreement with a public agency that gives the Eligible Applicant exclusive rights to negotiate with the agency for the acquisition of the site, provided that the major terms of the acquisition have been agreed to by all parties;

- (8) A land sales contract or other enforceable agreement for the acquisition of the property; or
- (9) Other forms of Site Control that give the Department equivalent assurance that the Eligible Applicant and/or Developer will be able to complete the Project and all housing designated in the application in a timely manner and in accordance with all the requirements of the Program.
- (hh) "Structured Parking" means a structure in which vehicle parking is accommodated on multiple stories; a vehicle parking area that is underneath all or part of any story of a structure; or a vehicle parking area that is not underneath a structure, but is entirely covered, and has a parking surface at least eight feet below grade. Structured Parking does not include surface parking, residential garages, or carports, including solar carports.
- (ii) "TCAC" means the California Tax Credit Allocation Committee.
- (jj) "TCAC/HCD Opportunity Area Map" means the most recently posted TCAC/HCD Opportunity Map that measures and provides a graphical representation of place-based characteristics linked to critical life outcomes, such as educational attainment, earnings from employment, and economic mobility. For projects on federal land, and properties not identified on the TCAC/HCD Opportunity Area Map, the Applicant may use the TCAC/HCD Opportunity Area Map's census tract nearest to the main entry for the Qualifying Infill Project.
<https://belonging.berkeley.edu/tcac-opportunity-map-2020>
- (kk) "Transit Priority Area" means an area within one-half mile of a Major Transit Stop that is existing or planned, if the planned stop is scheduled to be completed within the planning horizon included in a transportation improvement program adopted pursuant to Title 23 of the Code of Federal Regulations section 450.216 or 450.322.
- (ll) "Transit Station" means a rail or light-rail station, ferry terminal, Bus Hub, or Bus Transfer Station. Included in this definition are planned Transit Stations otherwise meeting this definition whose construction is programmed into a regional or state transportation improvement program to be completed no more than five years from the deadline for submittal of applications set forth in the NOFA.
- (mm) "Tribally Designated Housing Entity" has the meaning as set forth in Title 25 of the United States Code section 4103 and Health and Safety Code section 50104.6.5.
- (nn) "Urban Uses" means any residential, commercial, industrial, public institutional, transit or transportation passenger facility, or retail use, or any combination of those uses.
- (oo) "Urbanized Area" means an incorporated city or an Urbanized Area or urban cluster as defined by the United States Census Bureau. For unincorporated

areas outside of an urban area or urban cluster, the area must be within a designated urban service area that is designated in the local general plan for urban development and is served by public sewer and water systems.

- (pp) "Very Low-Income" has the meaning set forth in Health and Safety Code section 50105.
- (qq) "Walkable Route" shall mean a route which, after completion of the proposed Project, shall be free of negative environmental conditions that deter pedestrian circulation, such as barriers; stretches without sidewalks or walking paths; noisy vehicular tunnels; streets, arterials or highways without regulated crossings that facilitate pedestrian movement; or stretches without adequate lighting.

ARTICLE 2. PROGRAM REQUIREMENTS

Section 303. Eligible projects

- (a) To be eligible for funding, a Capital Improvement Project must be an integral part of, or necessary for the development, of the Qualifying Infill Project(s) identified in the application.
- (b) To be eligible for funding, all applications must include a Qualifying Infill Project, including those Qualifying Infill Projects used to establish the eligibility of a Qualifying Infill Area.
- (c) The Qualifying Infill Project or Qualifying Infill Area must meet all of the following conditions:
 - (1) Be located in an Urbanized Area.
 - (2) Be located in a Locality with an adopted housing element that has been found by the Department to be in substantial compliance with the requirements of Article 10.6 (commencing with section 65580) of Chapter 3 of Division 1 of Title 7 of the Government Code, pursuant to Government Code section 65585 at time of application. The requirements of this paragraph shall not apply to the duly constituted governing body of an Indian reservation or rancheria or Tribally Designated Housing Entity.
 - (A) Be located in a Locality that, at the time of application, has submitted its housing element annual progress reports as required by Government Code section 65400 to the State of California for the current and prior year.
 - (3) Include not less than 15 percent of the total residential units to be developed in the Qualifying Infill Project or Qualifying Infill Area as Affordable Units.
 - (A) For developments that contain both rental and ownership units, units of either or both product types may be included in the calculation of the percentage of Affordable Units.
 - (B) To the extent included in a Capital Improvement Project grant application, for the purpose of calculating the percentage of Affordable Units, the Department may consider the entire Master Development in which the development seeking grant funding is included.
 - (C) An Eligible Applicant must include a replacement housing plan if any dwelling units housing persons and families of Low- or Moderate-Income are removed from the Low- and Moderate-Income housing market by the Capital Improvement Project. The plan shall be consistent with Government Code section

65915(c)(3). Residential units to be replaced shall not be counted toward meeting the affordability threshold required for eligibility for funding under this Section.

- (D) A Qualifying Infill Project or Qualifying Infill Area for which a disposition and development agreement or other project or area-specific agreement between the Developer and the local agency having jurisdiction over the project has been executed on or before August 24, 2007, shall be deemed to meet the affordability requirement of this paragraph if the agreement includes affordability covenants that subject the Qualifying Infill Project or Qualifying Infill Area to the production of Affordable Units for Very Low-, Lower- or Moderate-Income households.
- (4) Include Net Densities on the parcels to be developed that are equal to or greater than the densities described in the Government Code section 65583.2, subdivision (c)(3)(B), except that a project located in a Rural Area shall include Net Densities on the parcels to be developed of at least 10 units per acre.
- (5) Be located in an area designated for mixed-use or residential development pursuant to one of the following adopted plans:
 - (A) A general plan adopted pursuant to Government Code section 65300.
 - (B) A project area redevelopment plan adopted pursuant to the Health and Safety Code section 33330.
 - (C) A regional blueprint plan as defined in the California Regional Blueprint Planning Program administered by the Business, Transportation and Housing Agency, or a regional plan as defined in the Government Code section 65060.7.
- (6) The Eligible Applicant must identify a mechanism, such as a minimum density ordinance or a recorded, binding covenant, acceptable to the Department to reliably ensure that future development will occur at an overall Net Density equaling or exceeding that set forth in Section 303(c)(4). This mechanism must be in effect and legally enforceable prior to the disbursement of Program funds.
- (7) Eligible Applicants shall designate the proposed residential units in the Qualifying Infill Project, or within the Qualifying Infill Area, that the Eligible Applicant intends to utilize for the purpose of establishing the maximum Program grant amount pursuant to Section 305, and for the purpose of rating applications pursuant to Sections 309 or 310. Any such designated units must be utilized for both purposes.

- (8) The application must demonstrate that the percentage of Affordable Units, and units restricted to other income limits and rents as designated for the purpose of determining the maximum Program grant amount in Section 305 and for rating purposes pursuant to Sections 309 or 310, shall be maintained or exceeded through the completion of each residential development proposed in the application. The Department may modify the requirement set forth in the previous sentence to conform to a similar local public agency requirement, provided that the Department determines that the local requirement will reliably result in completion of the required Affordable Units as set forth in Section 306.
- (9) Construction shall not have commenced on any units designated in the application prior to the deadline for applications submittal set forth in the NOFA.

Section 304. Eligible costs

- (a) Program grant funds must be used for reasonable and necessary costs of a Capital Improvement Project. Costs must be reasonable compared to similar infrastructure projects of modest design in the general area of the Capital Improvement Project. Eligible costs include the construction, rehabilitation, demolition, relocation, preservation, acquisition, or other physical improvements of the following:
 - (1) The creation, development, or rehabilitation of Parks or Open Space.
 - (2) Water, sewer, or other utility service improvements (including internet infrastructure), including relocation of such improvements.
 - (3) Street, road, and bridge construction and improvement.
 - (4) Structured Parking, including:
 - (A) Structured Parking spaces that are required replacement of Transit Station parking spaces, or public Structured Parking required as a condition of approval for the Qualifying Infill Project within one-half mile of a Major Transit Stop or Transit Station, not to exceed \$50,000 per space.
 - (B) Residential Structured Parking and mechanical parking lifts. The minimum residential per unit parking spaces in Structured Parking, as required by local land-use entitlement approval, not to exceed one parking space per residential unit, and not to exceed \$50,000 per permitted space.
 - (5) Transit linkages and facilities, including, but not limited to, related access plazas or pathways, or bus and transit shelters.

- (6) Facilities that support pedestrian or bicycle transit.
 - (7) Traffic mitigation measures.
 - (8) Site clearance, grading, preparation, and demolition necessary for the development of the Capital Improvement Project.
 - (9) Sidewalk or streetscape improvements, including, but not limited to, the reconstruction or resurfacing of sidewalks and streets or the installation of lighting, signage, or other related amenities, including shade structures, seating, landscaping, streetscaping, and public safety improvements.
 - (10) Storm drains, stormwater detention basins, culverts, and similar drainage features.
 - (11) Required environmental remediation necessary for the development of the Capital Improvement Project or Qualifying Infill Project, where the cost of the remediation does not exceed 50 percent of the Program grant amount.
 - (12) Site acquisition or control for the Capital Improvement Project including, but not limited to, easements and rights of way. Such costs must be deemed reasonable and demonstrated by documentation that may include appraisals, purchase contracts, or any other documentation as determined by the Department.
 - (13) Soft costs such as those incidentally but directly related to construction or other pre-development components including, but not limited to, planning, engineering, construction management, architectural, and other design work, required mitigation expenses such as mitigation design or testing, appraisals, legal expenses, and necessary easements. Soft costs shall not exceed 10 percent of costs associated with the funding request for the Capital Improvement Project.
 - (14) Other Capital Asset costs approved by the Department and required as a condition of local approval for the Capital Improvement Project.
 - (15) Impact fees required by local ordinance are eligible for Program funding only if used for the identified Capital Improvement Project. Funded impact fees may not exceed 5 percent of the Program award.
- (b) The following costs are not eligible:
- (1) Developer fees or profit.
 - (2) Costs of site acquisition for housing and mixed-use structural improvements.

- (3) Costs of housing or mixed-use structures.
- (4) Soft costs related to ineligible costs.
- (5) In-lieu fees for local inclusionary programs.

Section 305. Grant terms and limits

- (a) The total maximum grant amount shall be established by the number of units in the Qualifying Infill Project or Qualifying Infill Area, the bedroom count of these units, and the density and affordability of the housing to be developed. Replacement housing units may be included in the calculation of the total maximum grant amount. The Department shall publish a table listing per unit grant limits for each NOFA based on these factors. The total eligible grant amount shall be based upon the lesser of the amount necessary to fund the Capital Improvement Project or the maximum amount calculated from the table published by the Department.
- (b) Minimum and maximum award amounts are identified in the NOFA.
- (c) The Eligible Applicant must show in the development budget that Program funds are reasonably necessary for the Capital Improvement Project feasibility and no other source of compatible funding is reasonably available as evidenced in the application development budget.
- (d) The Eligible Applicant must demonstrate in the application development budget that the Qualifying Infill Project(s), as proposed in the application, is financially feasible as evidenced by documentation such as, but not limited to, a market study, Project proforma, sources and uses statement, or other feasibility documentation that is standard industry practice for the type of proposed housing development.
- (e) Where the Qualifying Infill Project is receiving low-income housing tax credits, the Recipient may provide Program funds to the Developer of the Qualifying Infill Project in the form of a zero percent deferred payment loan, with a term of at least 55 years. The loan may be secured by a deed of trust, which may be recorded with the local county recorder's office, provided the beneficiary of the loan shall not under any circumstances exercise any remedy, including, without limitation, foreclosure, under the deed of trust without the prior written consent of the Department, in its sole and absolute discretion. The loan may not be sold, assigned, assumed, conveyed, or transferred to any third party without prior written Department approval in its sole and absolute discretion. For Projects assisted by other Department funding programs, repayment of the loan between the Recipient and the Developer shall be limited to (1) no repayments to the Recipient until the maturity date or (2) repayment only from distributions from the Project within the meaning of 25 CCR section 8301(i). The Recipient shall be responsible for all aspects of establishing and servicing the loan. The provisions governing the loan shall be entirely consistent with these Guidelines and all documents required by the Department with respect to the use and disbursement

of Program funds. All documents governing the loan between the Recipient and the Developer borrower shall contain all the terms and conditions set forth in this subdivision and shall be subject to the review and approval of the Department prior to making the loan. This subdivision shall apply to any Qualifying Infill Project receiving low-income housing tax credits regardless of the date of the Program award.

- (f) Conditions precedent to the first disbursement of Program funds shall include receipt of all required public agency entitlements and all required funding commitments for any proposed Qualifying Infill Project supported by the Capital Improvement Project.
- (g) A city, county, city and county, public housing authority, or redevelopment agency that has jurisdiction over a Qualifying Infill Area and applies for funding jointly with an “owners’ association”, shall submit documentation from the local permitting authority demonstrating that the actual number of permitted housing units associated with the Qualifying Infill Project is equal to or greater than the number of housing units in the application.
- (h) Funds will be disbursed as progress payments for approved eligible costs incurred subject to the requirements of these Guidelines.
- (i) Where approval by a local public works department, or an entity with equivalent jurisdiction, is required for the Capital Improvement Project, the Recipient must submit, prior to the disbursement of grant funds, a statement or other documentation acceptable to the Department, indicating that the Capital Improvement Project is consistent with all applicable policies and plans enforced or implemented by that department or entity.
- (j) The covenant referred to in Section 302 (b) of these Guidelines shall be recorded against the fee title. The covenant is subject to liens, encumbrances and other matters of record approved by the Department pursuant to UMR sections 8310(f) and 8315.

Section 306. Performance requirements

- (a) If construction of residential units (used as the basis for calculating the grant amount in the application) has not received building permits within the time set forth in the NOFA and Standard Agreement, Recipients will be required to repay disbursed Program grant funds. The proportion of the amount to be repaid (A) to the total grant amount (B) shall be the same as the number of residential units where construction has not timely commenced (C) to the total number of designated residential units (D) (Formula: $A = C/D * B$).
- (b) Recipients shall, within the time set forth in the NOFA and Standard Agreement, begin construction of the housing units in the Qualifying Infill Project(s) identified in the application.

- (c) Recipients shall, within the time set forth in the NOFA and Standard Agreement, complete construction of the housing units which were used as the basis for calculating the Program award. Completion of construction must be evidenced by a certificate of occupancy or equivalent documentation and submitted to the Department.
- (d) Program funds must be disbursed in accordance with the deadlines specified in the NOFA and Standard Agreement. The Recipient needs to provide final disbursement requests by the disbursement date specified in the NOFA and Standard Agreement.
- (e) Recipients of Qualifying Infill Area awards must have closed construction period financing on a Qualifying Infill Project before a subsequent Program application is submitted within the Qualifying Infill Area.
- (f) An extension of performance requirements, if determined to be necessary by the Department, will be specified in the NOFA.

ARTICLE 3. APPLICATION PROCEDURES

Section 307. Application process

- (a) The Department shall offer Program funds through NOFAs. Applications shall be made on forms made available by the Department. Applications selected for funding shall be approved subject to conditions specified by the Department.
- (b) The NOFA will specify the amount of funds available, application requirements, minimum eligibility point scores, the deadline for submittal of applications, the schedule for rating and ranking applications and awarding funds, and the general terms and conditions of funding commitments.
 - (1) The Department shall accept applications for Projects and evaluate them on a competitive basis. The NOFA may specify a minimum number of ranking points for a Project to be eligible for funding.
 - (2) The Department may elect to not evaluate compliance with some or all threshold requirements for applications that are not within a fundable range as indicated by self-scoring.
 - (3) In the event of two or more applications having the same rating and ranking scores, the Department will apply the tie-breaking criteria set forth in the NOFA.
 - (4) The Department shall evaluate applications for compliance with the threshold requirements listed in Section 308 and score them based on the application selection criteria listed in Sections 309 or 310. The Department may make adjustments to this procedure to meet geographic targets identified in the NOFA.

Section 308. Application threshold requirements

- (a) The Capital Improvement Project set forth in the application must be eligible pursuant to Section 303, and the Eligible Applicant must be eligible pursuant to Section 302. Additionally, the following requirements apply to all applications:
 - (1) The Qualifying Infill Project or Qualifying Infill Area meets the infill requirements set forth in the Section 302 definitions of Qualifying Infill Project or Qualifying Infill Area.
 - (2) Construction of the Capital Improvement Project and Qualifying Infill Project(s) has not commenced as of the deadline for submittal of applications set forth in the NOFA.
 - (3) The Capital Improvement Project is infeasible without Program funds, and other available funds, including funds previously awarded by the Program, are not being supplanted by Program funds. Applicants with previously awarded funds must forfeit their prior award, in writing, prior to the

application due date without assurance of receiving a new award, including funds awarded under any Department program, or prior IIG award.

- (4) The Eligible Applicant of the Capital Improvement Project must have Site Control sufficient to ensure the timely commencement of the Capital Improvement Project as determined by the Department.
- (5) All proposed uses of Program funds must be eligible pursuant to Section 304.
- (b) The application must be sufficiently complete to assess the feasibility and competitiveness of the application and its compliance with Program requirements.
- (c) The Recipient shall comply with all state and federal fair housing laws. Compliance with state law includes but is not limited to the duty to carry out the program in a manner to affirmatively further fair housing, and take no action that is materially inconsistent with Affirmatively Furthering Fair Housing pursuant to Government Code section 8899.50. At the Department's election, Recipient must submit an attorney's opinion acceptable to the Department describing the intended occupancy restrictions and how they comply with the California Unruh Civil Rights Act (Civ. Code, §§ 51 - 53), and the California Fair Employment and Housing Act (FEHA) (Gov. Code, § 12900 et seq.) and the FEHA regulations (California Code of Regulations, title 2, sections 12005-12271. Occupancy restrictions must be carried out in a manner which does not violate state or federal fair housing laws.

Section 309. Selection criteria for Qualifying Infill Projects

Applications for Qualifying Infill Projects shall be rated using the criteria detailed below. Eligible Applicants may elect to exclude from consideration discrete phases or portions of their developments, provided these portions or phases are not included for other purposes under these Guidelines, including rating pursuant to this Section, and determining the maximum grant amount calculated pursuant to Section 305(a). Points are not cumulative within each subparagraph unless otherwise specified.

Selection Criteria for Qualifying Infill Project	Maximum Score
Project Readiness	100
Affordability	60
Density	40
Access to Transit	20
Access to Opportunity and Proximity to Amenities	20
Consistency with Regional Plans	10
Total	250

(a) Project readiness – 100 points maximum

Readiness points will be awarded as follows:

(1) Environmental Review Status - 30 points maximum

Applications will be awarded points based on the extent to which environmental reviews and necessary entitlements can be completed for the Qualifying Infill Project and received by the Department by the Program application due date:

- (A) Documented compliance with the California Environmental Quality Act (CEQA) and the National Environmental Policy Act (NEPA), if applicable, shall receive 30 points (all applicable time periods for filing appeals or lawsuits must have lapsed).
 - (i) However, where project-based vouchers are the only subsidy triggering NEPA review, completed NEPA review is not required to obtain full readiness points.
- (B) Issuance of a public notice of the availability of a draft environmental impact report, negative declaration, or environmental assessment, shall receive 15 points.

(2) Land use entitlement status - 30 points maximum

Applications will be awarded points based on the extent that the Qualifying Infill Project can secure necessary entitlements from the local jurisdiction, which are to be received by the Department by the Program application due date, as follows:

- (A) Applications, which demonstrate that all necessary local land use approvals have been granted for the Qualifying Infill Project, as determined by a local land use authority (e.g., planning or community development director or zoning administrator) shall receive 30 points.
- (B) Applications which demonstrate that the Qualifying Infill Project is consistent with all relevant local planning documents and zoning ordinances and applications for all necessary discretionary local land use approvals have been submitted and deemed complete by the appropriate local agencies shall receive 15 points.
- (C) Applications which demonstrate that the Qualifying Infill Project is eligible to receive all necessary local land use approvals pursuant to a Nondiscretionary Local Approval Process shall receive 10 points.

(3) Leveraged funding commitments - 20 points maximum

Applications will be awarded points based on the extent the Eligible Applicant can demonstrate securing Enforceable Funding Commitments derived from sources other than the Program for the timely development of the Qualifying Infill Project, as follows:

(A) Rental housing developments

- (i) Applications that demonstrate commitments for at least 90 percent of the total development cost, less deferred costs, shall receive 20 points.
- (ii) Applications that demonstrate commitments for at least 75 percent of the total development cost, less deferred costs, shall receive 10 points.

(B) Ownership developments

- (i) Applications that demonstrate commitments for at least 90 percent of the total development cost including all necessary public agency funds, less private mortgage financing and deferred costs, shall receive 20 points.
- (ii) Applications that demonstrate commitments for at least 75 percent of the total development cost, less deferred costs, shall receive 10 points.

(C) Combined rental and ownership developments

- (i) Applications designating both rental and ownership units will be awarded points on the funding commitments for the Qualifying Infill Project on a percentage basis in proportion to the number of rental and ownership units. For example, in a 100 unit development consisting of 80 rental units and 20 ownership units, the number of points will be weighted 80 percent for the funding commitments associated with the rental units and 20 percent for the funding commitments associated with the ownership units, then the respective scores for each component will be combined, not to exceed 20 points.

(4) Local support - 12 points maximum

(A) Points will be awarded for one of the following:

- (i) Obtaining a funding commitment or commitments from a local public agency or agencies for the Qualifying Infill Project or

Capital Improvement Project equivalent to at least 25 percent of the Program grant shall receive 12 points.

- (ii) Obtaining a funding commitment or commitments from a local public agency or agencies for the Qualifying Infill Project or Capital Improvement Project equivalent to at least 15 percent of the Program grant shall receive 3 points.

(B) For purposes of awarding points pursuant to this Section, the following will also be considered a commitment of Local Support:

- (i) Conditionally reserved federal or state program funds administered by a local public agency or agencies for the Qualifying Infill Project or Capital Improvement Project shall also be accepted as funding commitments demonstrating Local Support. Such programs include, but are not limited to, the HUD Continuum of Care (CoC), Home Investment Partnerships Program (HOME), and Community Development Block Grant Program (CDBG).
- (ii) A Land Donation or a Local Fee Waiver shall be considered a commitment of Local Support. The value of the Land Donation will be the greater of either the original purchase price or the current appraised value as supported by an independent third-party appraisal prepared by a Member of the Appraisal Institute (MAI) conducted within one year of the application deadline. A commitment of Local Support in the form of a Local Fee Waiver must be evidenced by written documentation from the local public agency.
- (iii) Additional debt supported by project-based vouchers committed to a Project through the Locality.

(5) Prohousing policies – 8 points maximum

(A) Points will be awarded for up to two of the following:

- (i) Four points will be awarded to Projects located in jurisdictions that have implemented programs over the last five years, which are currently in effect, that finance infrastructure with accompanying increased housing capacity in areas of high segregation and poverty or low resource opportunity area (see TCAC/HCD Opportunity Area Maps) or disadvantaged community pursuant to Senate Bill 535 and Assembly Bill 1550 or provide local financial incentives for housing, including, but not limited to, a local housing trust fund or fee waivers.
- (ii) Four points will be awarded to Projects located in jurisdictions that have adopted a Nondiscretionary Local Approval Process

for residential and mixed-use development in all zones permitting multifamily housing, established a Workforce Housing Opportunity Zone, as defined in Government Code section 65620, or a housing sustainability district, as defined in Government Code section 66200.

- (iii) Four points will be awarded to Projects located in jurisdictions that zone more sites for residential development or zoning sites at higher densities than is required to accommodate 150 percent of the minimum regional housing need allocation for the Lower-Income allocation in the current housing element cycle.
- (iv) Four points will be awarded to Projects in jurisdictions that have adopted accessory dwelling unit ordinances or other mechanisms that reduce barriers for property owners to create accessory dwelling units beyond the requirements outlined in Government Code section 65852.2, as follows:
 - 1. Parking reductions to 0.75 or fewer spaces per accessory dwelling unit in areas not already exempt from parking pursuant to Government Code section 65852.2,
 - 2. Processing and impact fee waivers or reductions of 50 percent or more,
 - 3. Ministerial approval in fewer than 45 days,
 - 4. Reduction or modifications of development standards for side yard setbacks of 5 feet or less,
 - 5. Reduction or modifications of development standards to two story heights,
 - 6. Reduction or modifications of development standards to allow 60 percent or more lot coverage,
 - 7. No minimum lot size requirement,
 - 8. Provisions for affordability, or
 - 9. Offering support programs such as a user-friendly website.
- (v) Four points will be awarded to Projects located in jurisdictions that only use objective design standards for multifamily residential development or adopt fee transparency measures including publicly available fee calculators.

(b) Affordability – 60 points maximum

Applications will be awarded points based on the percentage of units in the Qualifying Infill Project restricted to occupancy by various income groups. Applications designating only rental units in the Qualifying Infill Project may elect to have their applications scored in accordance with any one of the two following scales. Applications designating ownership units, or a combination of rental and ownership units, must utilize the scale set forth in paragraph 2 below. Where appropriate based on the mix of income groups, applications must demonstrate units affordable to Lower-Income groups are spatially integrated throughout the Qualifying Infill Project.

- (1) For rental units used as the basis for point scores in the application, rent limits for initial occupancy and for each subsequent occupancy shall be based on unit type, applicable income limit, and area in which the Qualifying Infill Project is located, following the calculation procedures used by TCAC. Rents shall be restricted in accordance with the rent and income limits specified in the application and approved by the Department and set forth in a legally binding agreement recorded against the Qualifying Infill Project with a duration of at least 55 years. Rents shall not exceed 30 percent of the applicable income eligibility level. The Income Eligibility table is specified in the Multifamily Housing Program Guidelines section 7320(b)(1). Eligible Applicants making this election shall be awarded 60/35 points for every 1 point they would be eligible to receive using MHP's system (applications eligible for the maximum possible 35 points using the MHP scale receive the maximum possible points in this category for the Program).
- (2) Owner-occupied units shall be subject to a recorded covenant with a duration of at least 30 years that includes either a resale restriction or a requirement for sharing equity upon resale. The following scale must be used for developments that include ownership units:
 - (A) 0.30 points will be awarded for each percent of total units that are owner-occupied and restricted to occupancy by households with incomes not exceeding the Moderate-Income limit.
 - (B) 0.80 points will be awarded for each percent of total units that are owner-occupied and restricted to occupancy by households with incomes not exceeding the Lower-Income limit.
 - (C) 0.40 points will be awarded for each percent of total units that are rental units restricted to occupancy by households with incomes not exceeding 50 percent of AMI.
 - (D) 2.0 points will be awarded for each percent of total units that are rental units restricted to occupancy by households with incomes less than or equal to 30 percent of AMI, or that are or will be covered by a long-term, project-based rental or operating subsidy contract

under a program that either has a history of predominately serving households at this income level or that by design will reliably serve this population.

(c) Density – 40 points maximum

Applications will be scored based on the extent to which the Net Density of the Qualifying Infill Project exceeds the required density specified in Section 303(c)(4). Density calculations shall be evidenced by a date stamped map certified by a licensed State of California professional such as an architect, engineer, or surveyor.

(1) Net Density will be adjusted by unit size (and commercial space as applicable) as follows:

Example = Mixed-use project, three-quarter acre, urban site, with 12 one-bedroom units at 800 square feet each, 12 two-bedroom units at 1,100 square feet each, and 5,000 square feet of commercial space.

Based on the density factors in the chart below, the equation looks like this:

$$12 \times 0.9 \text{ (one-bedroom units)} = 10.8$$

$$12 \times 1.2 \text{ (two-bedroom units)} = 14.4$$

To attribute density to the commercial space, utilize the square footage and bedroom count of the largest unit in the project to determine how many whole units would fit into the square footage of the commercial space.

For this example, the largest unit is a two-bedroom, 1,100 square foot unit. 5,000 square feet (commercial space) would accommodate four (4) of these units. Multiply that result by the appropriate factor:

$$4 \times 1.2 \text{ (two-bedroom units)} = 4.8$$

To calculate the percentage at which this project meets or exceeds the required density, add all three resulting calculations above, and divide by the minimum density required for the project site (in this case 30 units/acre for an urban site), then by the number of acres in the project, then multiply by 100 (for percentage):

$$(10.8+14.4+4.8)/30 = 1/.75=1.3333 \times 100=133.33 \text{ percent}$$

Unit Size (Bedrooms)	Factor
0-Bedroom	0.7
1-Bedroom	0.9
2-Bedroom	1.2
3-Bedroom	1.6
4-Bedroom	1.8

- (2) Points will be awarded in accordance with the following schedule:

Adjusted Net Density as a Percentage of Required Density	Points
150 percent or More	40
140 percent to 149.9 percent	30
130 percent to 139.9 percent	20
120 percent to 129.9 percent	15
110 percent to 119.9 percent	10
Less than 110 percent	0

- (d) Access to Transit – 20 points maximum

Points will be awarded based on the proximity of, or accessibility to, the Qualifying Infill Project to a Transit Station or Major Transit Stop. The distance to a Transit Station or Major Transit Stop shall be evidenced by a scaled map.

- (1) A Qualifying Infill Project within one-quarter mile of a Transit Station or Major Transit Stop, measured by a Walkable Route from the nearest boundary of the Qualifying Infill Project to the outer boundary of the site of the Transit Station or Major Transit Stop shall receive 20 points.
- (2) A Qualifying Infill Project within one-half mile of a Transit Station or a Major Transit Stop, measured by a Walkable Route from the nearest boundary of the Qualifying Infill Project to the outer boundary of the site of the Transit Station or Major Transit Stop and located in an area of high segregation and poverty or low resource opportunity area (see TCAC/HCD Opportunity Area Maps) or disadvantaged community pursuant to Senate Bill 535 and Assembly Bill 1550 shall receive 15 points.
- (3) A Qualifying Infill Project within one-half mile of a Transit Station or a Major Transit Stop, measured by a Walkable Route from the nearest boundary of the Qualifying Infill Project to the outer boundary of the site of the Transit Station or Major Transit Stop shall receive 10 points.

- (e) Access to Opportunity and Proximity to Amenities – 20 points maximum

Applications will be awarded points based on the proximity or accessibility of the Qualifying Infill Project to the following existing amenities or amenities that will be in service when the construction of the Qualifying Infill Project is completed. The distance to amenities shall be evidenced by a scaled map.

Applications may receive only one award of points from each of the following subcategories:

- (1) A Qualifying Infill Project is located in a High or Highest Resource Area as specified on TCAC/HCD Opportunity Area Maps shall receive 20 points (for Federal land, and properties not identified on

the TCAC/HCD Opportunity Area Map, the Applicant may use the TCAC/HCD Opportunity Area Map's census tract nearest to the main entry for the Qualifying Infill Project (<https://belonging.berkeley.edu/tcac-opportunity-map-2020>).

- (2) A Qualifying Infill Project located within one-quarter mile of a Park (one-half mile for Rural Area projects) (not including school grounds unless there is a bona fide, formal joint use agreement between the jurisdiction responsible for the Parks/recreational facilities and the school district providing availability to the general public of the school grounds and/or facilities), shall receive 5 points, or if within one-half mile (one mile for Rural Area projects) 3 points.
 - (3) A Qualifying Infill Project located within one mile of a locally recognized Employment Center with a minimum of 50 full-time employees (two miles for Rural Area projects), shall receive 5 points, or if within two miles (four miles for Rural Area projects) 3 points.
 - (4) A Qualifying Infill Project located within one mile of a locally recognized Retail Center with a minimum of 50 full-time employees (two miles for Rural Area projects), shall receive 5 points, or if within two miles (four miles for Rural Area projects), 3 points.
 - (5) A Qualifying Infill Projects located within one- quarter mile of a public school or community college that residents of the Qualifying Infill Project may attend (one-half mile for Rural Area projects), shall receive 5 points, or if within one-half mile (one mile for Rural Area projects), 3 points.
 - (6) A Qualifying Infill Project located within one-half mile of a social service facility that operates to serve residents of the Qualifying Infill Project, shall receive 5 points, or if within one mile, 3 points.
- (f) Consistency with regional plans – 10 points maximum
- (1) Points will be awarded for each of the following (necessary evidence is to be received by the Department by the Program application due date):
 - (A) Five points will be awarded if the Qualifying Infill Project supports the implementation of a sustainable community's strategy or alternative planning strategy that has been determined by the California Air Resources Board to achieve the region's greenhouse gas emissions target. Consistency with such plans must be demonstrated by a letter or resolution executed by an officer or an equivalent representative from the metropolitan planning organization, regional transportation agency, planning, or local transportation commission.

- (B) If a sustainable community's strategy is not required for a region by law, 5 points will be awarded if the Qualifying Infill Project supports a regional plan that includes policies and programs to reduce greenhouse gas emissions. Evidence of consistency with such plans must be demonstrated by a letter or resolution executed by an officer of, or an equivalent representative from, the metropolitan planning organization or regional transportation planning agency or local transportation commission.
- (C) A Qualifying Infill Project in which not less than 50 percent of the land area is within a Transit Priority Area shall receive 5 points. Evidence of Qualifying Infill Project location within, or partially within, a Transit Priority Area must be demonstrated by a letter or resolution executed by an officer of, or an equivalent representative from, the metropolitan planning organization, regional transportation planning agency, or local transportation commission.

Section 310. Selection criteria for Qualifying Infill Areas

Applications for Qualifying Infill Areas shall be rated using the criteria detailed below. Eligible Applicants may elect to exclude from consideration discrete phases or portions of the developments within the Qualifying Infill Area, provided these portions or phases are not included for other purposes under these Guidelines, including rating pursuant to this Section, and determining the maximum grant amount calculated pursuant to Section 305 (a). Points are not cumulative within each subparagraph unless otherwise specified.

Selection Criteria for Qualifying Infill Areas	Maximum Score
Area Readiness	100
Affordability	60
Density	40
Access to Transit	20
Access to Opportunity and Proximity to Amenities	20
Consistency with Regional Plans	10
Total	250

- (a) Area readiness – 100 points maximum

Readiness points will be awarded as follows:

- (1) Multiple Qualifying Infill Projects – 10 points maximum
 - (A) Qualifying Infill Areas with three or more Qualifying Infill Projects that provide a minimum of 250 new or rehabilitated housing units and can secure all land use entitlements required for construction, which are to be received by the Department by the Program application due date, or that all applications required for construction have been submitted under a Nondiscretionary Local Approval Process shall

receive 10 points.

- (B) Qualifying Infill Areas with two Qualifying Infill Projects that provide a minimum of 150 new or rehabilitated housing units and can secure all land use entitlements required for construction, which are to be received by the Department by the Program application due date, or that all applications required for construction have been submitted under a Nondiscretionary Local Approval Process shall receive 5 points.

(2) Environmental review status - 25 points maximum

Applications will be awarded points based on the extent to which environmental reviews and necessary entitlements can be completed for the Qualifying Infill Area and received by the Department by the Program application due date:

- (A) Documented compliance with the CEQA and the NEPA, if applicable, shall receive 25 points (all applicable time periods for filing appeals or lawsuits must have lapsed).
 - (i) However, where project-based vouchers are the only subsidy triggering NEPA review, completed NEPA review is not required to obtain full readiness points.
- (B) Applications for Qualifying Infill Areas for which a draft of a program, master or tiered environmental impact report has been certified by the appropriate agency and the developments included in the application will constitute subsequent projects subject to environmental review as such pursuant to CEQA Guidelines, Chapter 3, Title 14, CCR, commencing with section 15000 shall receive 15 points.
- (C) Applications for Qualifying Infill Areas for which a draft of a program, master or tiered environmental impact report has been completed and filed with the appropriate agency and the developments included in the application will constitute subsequent projects subject to environmental review as such pursuant to CEQA Guidelines, Chapter 3, Title 14, CCR, commencing with section 15000 shall receive 10 points.
- (D) Applications for Qualifying Infill Areas in which not less than 50 percent of the land area is on sites that have been subject to a Phase 1 Site Assessment within one year prior to the application due date shall receive 5 points.

(3) Land use entitlement status - 25 points maximum

Applications will be awarded points based on the extent that developments within the Qualifying Infill Area can secure necessary entitlements from the

local jurisdiction, which are to be received by the Department by the Program application due date, as follows:

- (A) Applications which demonstrate that all necessary local land use approvals for developments within the Qualifying Infill Area have been granted, as determined by a local land use authority (e.g., planning or community development director or zoning administrator) shall receive 25 points.
- (B) Applications which demonstrate that the developments within the Qualifying Infill Area are consistent with all relevant local planning documents and zoning ordinances and applications for all necessary discretionary local land use approvals have been submitted and deemed complete by the appropriate local agencies shall receive 15 points.
- (C) Applications which demonstrate that the developments within the Qualifying Infill Area are eligible to receive all necessary local land use approvals pursuant to a Nondiscretionary Local Approval Process shall receive 10 points.

(4) Leveraged funding commitments - 20 points maximum

Applications will be awarded points based on the extent the Eligible Applicant can demonstrate securing of Enforceable Funding Commitments derived from sources other than the Program for the timely development of the Qualifying Infill Area, as follows:

- (A) Rental housing developments
 - (i) Applications that demonstrate commitments for at least 90 percent of the total development cost, less deferred costs, shall receive 20 points.
 - (ii) Applications that demonstrate commitments for at least 75 percent of the total development cost, less deferred costs, shall receive 10 points.
- (B) Ownership developments
 - (i) Applications that demonstrate commitments for at least 90 percent of the total development cost including all necessary public agency funds, less private mortgage financing and deferred costs, shall receive 20 points.

- (ii) Applications that demonstrate commitments for at least 75 percent of the total development cost, less deferred costs, shall receive 10 points.

(C) Combined rental and ownership developments

- (i) Applications designating both rental and ownership units will be awarded points on the funding commitments for the Qualifying Infill Project on a percentage basis in proportion to the number of rental and ownership units. For example, in a 100 unit development consisting of 80 rental units and 20 ownership units, the number of points will be weighted 80 percent for the funding commitments associated with the rental units and 20 percent for the funding commitments associated with the ownership units, then the respective scores for each component will be combined, not to exceed 20 points.

(5) Local support - 12 points maximum

(A) Points will be awarded for one or more of the following:

- (i) Obtaining a funding commitment or commitments from a local public agency or agencies for the Qualifying Infill Area or Capital Improvement Project equivalent to at least 25 percent of the Program grant shall be awarded 12 points.
- (ii) Obtaining a funding commitment or commitments from a local public agency or agencies for the Qualifying Infill Area or Capital Improvement Project equivalent to at least 15 percent of the Program grant will be awarded 3 points.

(B) For purposes of awarding points pursuant to this Section, the following will also be considered a commitment of Local Support:

- (i) Conditionally reserved federal or state program funds administered by a local public agency or agencies for the Qualifying Infill Area or Capital Improvement Project shall also be accepted as funding commitments demonstrating Local Support. Such programs include, but are not limited to, the HUD Continuum of Care (CoC), Home Investment Partnerships Program (HOME), and Community Development Block Grant Program (CDBG).
- (ii) A Land Donation or a Local Fee Waiver may be considered a commitment of Local Support. The value of the Land Donation will be the greater of either the original purchase price or the current appraised value as supported by an independent third-

party appraisal prepared by a Member of the Appraisal Institute (MAI) conducted within one year of the application deadline. A commitment of Local Support in the form of a Local Fee Waiver must be evidenced by written documentation from the local public agency.

- (iii) Additional debt supported by project based vouchers committed to a Project through a Locality.

(6) Prohousing Policies - 8 points maximum

(A) Points will be awarded for up to two of the following:

- (i) Four points will be awarded to Projects located in jurisdictions that have implemented programs over the last five years, that are currently in effect, that finance infrastructure with accompanying increased housing capacity in areas of high segregation and poverty or low resource opportunity area (see TCAC/HCD Opportunity Area Maps) or disadvantaged community pursuant to Senate Bill 535 and Assembly Bill 1550 or provide local financial incentives for housing, including, but not limited to, a local housing trust fund or fee waivers.
- (ii) Four points will be awarded to Projects located in jurisdictions that have adopted a Nondiscretionary Local Approval Process for residential and mixed-use development in all zones permitting multifamily housing, established a Workforce Housing Opportunity Zone, as defined in Government Code section 65620, or a housing sustainability district, as defined in Government Code section 66200.
- (iii) Four points will be awarded to Projects located in jurisdictions that zone more sites for residential development or zoning sites at higher densities than is required to accommodate 150 percent of the minimum regional housing need allocation for the Lower-Income allocation in the current housing element cycle.
- (iv) Four points will be awarded to Projects in jurisdictions that have adopted accessory dwelling unit ordinances or other mechanisms that reduce barriers for property owners to create accessory dwelling units beyond the requirements outlined in Government Code section 65852.2, as follows:
 - 1. Parking reductions to 0.75 or fewer spaces per accessory dwelling unit in areas not already exempt from parking pursuant to Government Code section 65852.2,

2. Processing and impact fee waivers or reductions of 50 percent or more,
 3. Ministerial approval in fewer than 45 days,
 4. Reduction or modifications of development standards for side yard setbacks of 5 feet or less,
 5. Reduction or modifications of development standards to two story heights,
 6. Reduction or modifications of development standards to allow 60 percent or more lot coverage,
 7. No minimum lot size requirement,
 8. Provisions for affordability, or
 9. Offering support programs such as a user-friendly website.
- (v) Four points will be awarded to Projects located in jurisdictions that only use objective design standards for multifamily residential development or adopt fee transparency measures including publicly available fee calculators.

(b) Affordability – 60 points maximum

Applications will be awarded points based on the percentage of units to be developed in the Qualifying Infill Area that will be restricted to occupancy by various income groups, in accordance with the schedule below. Applications designating only rental units may elect to have their applications scored in accordance with any one of the two following scales. Applications designating ownership units, or a combination of rental and ownership units, must utilize the scale set forth in paragraph 2 below. Where appropriate based on the mix of income groups, applications must demonstrate units affordable to Lower-Income households are spatially integrated throughout the Qualifying Infill Project.

- (1) For rental units used as the basis for point scores in the application, rent limits for initial occupancy and for each subsequent occupancy shall be based on unit type, applicable income limit, and area in which the Qualifying Infill Project is located, following the calculation procedures used by TCAC. Rents shall be restricted in accordance with the rent and income limits specified in the application and approved by the Department and set forth in a legally binding agreement recorded against the Qualifying Infill Project with a duration of at least 55 years. Rents shall not exceed 30 percent of the applicable income eligibility level. The scale is used by MHP is specified in the Multifamily Housing Program Guidelines section 7320(b)(1). Eligible Applicants making this election shall be

awarded 60/35 points for every 1 point they would be eligible to receive using MHP's system (applications eligible for the maximum possible 35 points using the MHP scale receive the maximum possible points in this category for the Program).

- (2) Owner-occupied units shall be subject to a recorded covenant with a duration of at least 30 years that includes either a resale restriction or a requirement for sharing equity upon resale. The following scale must be used for developments that include ownership units:
 - (A) 0.30 points will be awarded for each percent of total units that are owner-occupied and restricted to occupancy by households with incomes not exceeding the Moderate-Income limit.
 - (B) 0.80 points will be awarded for each percent of total units that are owner-occupied and restricted to occupancy by households with incomes not exceeding the Lower-Income limit.
 - (C) 0.40 points will be awarded for each percent of total units that are rental units restricted to occupancy by households with incomes not exceeding 50 percent of AMI.
 - (D) 2.0 points will be awarded for each percent of total units that are rental units restricted to occupancy by households with incomes less than or equal to 30 percent of AMI, or that are or will be covered by a long-term, project-based rental or operating subsidy contract under a program that either has a history of predominately serving households at this income level or that by design will reliably serve this population.

(c) Density – 40 points maximum

Applications will be scored based on the extent to which the Net Density of the Qualifying Infill Area exceeds the required density specified in Section 303(c)(4). Density calculations shall be evidenced by a date stamped map certified by a licensed State of California professional such as an architect, engineer, or surveyor.

- (1) Net Density of the units utilized in the calculation of the grant amount adjusted for unit size by multiplying the factors shown below by the total number of units in each unit size category, then summing the resulting products, then dividing by the net area of all projects. For a suburban three-site Qualifying Infill Area:

Project # 1	Seven 2-Bedroom Units	Five 3-Bedroom Units	0.75 Acre
Project # 2	Six 2-Bedroom Units	Eight 3-Bedroom Units	0.65 Acre
Project # 3	Nine 2-Bedroom Units	Seven 3-Bedroom Units	0.50 Acre

The adjusted Net Density would be 22 two-bedroom units times 1.2 plus 20 three-bedroom units times 1.6 or 58.4. Dividing this by 20 (suburban minimum density) and 1.9 acres (net area of the three sites) and multiplied by 100 results in an adjusted Net Density as a percentage of required density of 153.7 percent which yields 15 points for Density.

Unit Size (Bedrooms)	Factor
0-Bedroom	0.7
1-Bedroom	0.9
2-Bedroom	1.2
3-Bedroom	1.6
4-Bedroom	1.8

- (2) Points will be awarded in accordance with the following schedule:

Adjusted Net Density as a Percentage of Required Density	Points
150 percent or more	40
140 percent to 149.9 percent	30
130 percent to 139.9 percent	20
120 percent to 129.9 percent	15
110 percent to 119.9 percent	10
Less than 110 percent	0

- (d) Access to Transit – 20 points maximum

Points will be awarded based on the proximity of, or accessibility to, the closest Qualifying Infill Project to a Transit Station or Major Transit Stop. The distance to a Transit Station or Major Transit Stop shall be evidenced by a scaled map.

- (1) Twenty points will be awarded to a closest Qualifying Infill Project within one quarter mile of a Transit Station or Major Transit Stop, measured by a Walkable Route from the nearest boundary of the Qualifying Infill Project to the outer boundary of the site of the Transit Station or Major Transit Stop.
- (2) Fifteen points will be awarded for a Qualifying Infill Project within one-half mile of a Transit Station or a Major Transit Stop, measured by a Walkable Route from the nearest boundary of the Qualifying Infill Area to the outer boundary of the site of the Transit Station or Major Transit Stop and located in an area of high segregation and poverty or low resource opportunity area (see

TCAC/HCD Opportunity Area Maps) or disadvantaged community pursuant to Senate Bill 535 and Assembly Bill 1550.

- (3) Ten points will be awarded to a Qualifying Infill Project within one-half mile of a Transit Station or a Major Transit Stop, measured by a Walkable Route from the nearest boundary of the Qualifying Infill Project to the outer boundary of the site of the Transit Station or Major Transit Stop.

(e) Access to Opportunity and Proximity to Amenities – 20 points maximum

Applications will be awarded points based on the proximity or accessibility of the closest Qualifying Infill Project to the following existing amenity or amenities that will be in service when construction of the Qualifying Infill Project for the Qualifying Infill Area is completed. The distance to amenities shall be evidenced by a scaled map.

Applications may receive only one award of points from each of the following subcategories:

- (1) The Qualifying Infill Project is located in High or Highest Resource Areas (as specified on TCAC/HCD Opportunity Area Maps) shall receive 20 points (for Federal land, and properties not identified on the TCAC/HCD Opportunity Area Map, the Applicant may use the TCAC/HCD Opportunity Area Map's census tract nearest to the main entry for the Qualifying Infill Project <https://belonging.berkeley.edu/tcac-opportunity-map-2020>).
- (2) The Qualifying Infill Project is within one-quarter mile of a Park (one-half mile for Rural Area projects) (not including school grounds unless there is a bona fide, formal joint use agreement between the jurisdiction responsible for the Parks/recreational facilities and the school district providing availability to the general public of the school grounds and/or facilities), 5 points, or within one-half mile (one mile for Rural Area projects), 3 points.
- (3) The Qualifying Infill Project is within one mile of a locally recognized Employment Center with a minimum of 50 full-time employees (two miles for Rural Area projects), 5 points, or within two miles (four miles for Rural Area projects), 3 points.
- (4) The Qualifying Infill Project is within one mile of a locally recognized Retail Center with a minimum of 50 full-time employees (two miles for Rural Area projects), 5 points, or within two miles (four miles for Rural Area projects), 3 points.
- (5) For Qualifying Infill Projects within one-quarter mile of a public school or community college that residents of the Qualifying Infill Project may attend (one-half mile for Rural Area projects), 5 points, or within one-half mile (one mile for Rural Area projects), 3 points.

- (6) For a Qualifying Infill Project that is located within one-half mile of a social service facility that operates to serve residents of the Qualifying Infill Project, 5 points, or within one mile, 3 points.
- (f) Consistency with regional plans – 10 points maximum
 - (1) Points will be awarded for each of the following (necessary evidence is to be received by the Department by the Program application due date):
 - (A) Five (5) points will be awarded if the Qualifying Infill Area supports the implementation of a sustainable community's strategy or alternative planning strategy that has been determined by the California Air Resources Board to achieve the region's greenhouse gas emissions target. Consistency with such plans must be demonstrated by a letter or resolution executed by an officer of, or an equivalent representative from, the metropolitan planning organization, regional transportation planning agency, or local transportation commission.
 - (B) If a sustainable community's strategy is not required for a region by law, 5 points will be awarded if the Qualifying Infill Area supports a regional plan that includes policies and programs to reduce greenhouse gas emissions. Evidence of consistency with such plans must be demonstrated by a letter or resolution executed by an officer, or equivalent representative, from the metropolitan planning organization or regional transportation planning agency, or local transportation commission.
 - (C) A Qualifying Infill Area in which not less than 50 percent of the land area is within a Transit Priority Area shall receive 5 points. Evidence of a Qualifying Infill Area location within, or partially within (as defined in this Section), a Transit Priority Area must be demonstrated by a letter or resolution executed by an officer of, or an equivalent representative from, the metropolitan planning organization, regional transportation planning agency, or local transportation commission.

ARTICLE 4. PROGRAM OPERATIONS

Section 311. Legal documents

Upon the award of Program funds, the Department shall enter into a Standard Agreement with the Recipient constituting a conditional commitment of funds. This contract shall require the parties to comply with the requirements and provisions of these Guidelines. The Standard Agreement shall encumber funds in an amount sufficient to fund the approved project, subject to limits established in the NOFA and consistent with the application. The Standard Agreement shall contain, but not be limited to, the following as appropriate for the activity:

- (a) A description of the approved Capital Improvement Project and the approved Qualifying Infill Project, Qualifying Infill Area, or both, and the permitted uses of Program funds;
- (b) Provisions governing the amount, terms and conditions of the Program grant;
- (c) Provisions governing the construction work and, as applicable, the acquisition and preparation of the site of the Capital Improvement Project, and the manner, timing, and conditions of the disbursement of grant funds;
- (d) The Recipient's responsibilities for the development of the approved Capital Improvement Project, including, but not limited to, construction management, maintaining files, accounts, other records, and reporting requirements;
- (e) Provisions relating to the development, construction, affordability, and occupancy of the Qualifying Infill Project supported by the Capital Improvement Project and the development, construction and occupancy of housing designated for development in the application for funding of a Qualifying Infill Area;
- (f) Provisions related to carrying-out the program in a manner to affirmatively further fair housing, and taking no action that is materially inconsistent with Affirmatively Furthering Fair Housing pursuant to Government Code section 8899.50.
- (g) Provisions relating to the placement on, or in the vicinity of, the Project site, a sign indicating that the Department has provided funding for the Capital Improvement Project. The Department may also arrange for publicity of the Department grant in its sole discretion;
- (h) Remedies available to the Department in the event of a violation, breach or default of the Standard Agreement;
- (i) Requirements that the Recipient permit the Department or its designated agents and employees the right to inspect the Project and all books, records and documents maintained by the Recipient in connection with the Program grant;
- (j) Special conditions imposed as part of Department approval of the project;

- (k) Terms and conditions required by federal or state law; and
- (l) Other provisions necessary to ensure compliance with the requirements of the Program.

Section 312. Reporting requirements

- (a) During the full term of the Standard Agreement and covenant and according to the deadlines identified in the Standard Agreement and the covenant, the Recipient shall submit, upon request of the Department, an annual performance report regarding the construction of the Capital Improvement Project; and upon receipt of the certificate of occupancy, an annual monitoring report regarding the affordability and occupancy of the housing Project designated in the application.
- (b) At any time during the term of the Standard Agreement and/or covenant, the Department may perform or cause to be performed a financial audit of any and all phases of the Recipient's Project. At the Department's request, the Recipient shall provide, at its own expense, a financial audit prepared by a certified public accountant.
- (c) The Recipient and owner agree to regular monitoring of the housing development by the Department or such designee the Department may name at any time during the term of the Standard Agreement and/or covenant, to verify compliance with the requirements of the Program. The Recipient and owner, or designee, shall submit annual reports as required by the Department on forms approved or provided by the Department, detailing components of the on-going operations of the housing development, as noted in this subsection. The components of annual operations for which reporting is required, which the Department retains the right to inspect, or cause to be inspected, include, and are not limited to:
 - (1) The Qualifying Infill Project or the housing designated in the Qualifying Infill Area, including interior of units, common areas, and exterior of the development;
 - (2) Tenant files, demonstrating compliance with Program affordability standards;
 - (3) Financial records, including the right to request a certified financial audit of the revenue, expenses, and operations of the housing development; and
 - (4) Insurance records to ensure continuous insurance coverage in accordance with Department and Program requirements.

The Department retains the authority to compel the Recipient and owner to comply with Program requirements as detailed in the IIG restrictive covenant recorded against the property.

Section 313. Defaults and cancellations

- (a) In the event of a breach or violation by the Recipient of any of the provisions of the Standard Agreement, the Department may give written notice to the sponsor to cure the breach or violation within a period of not less than 15 days. If the breach or violation is not cured to the satisfaction of the Department within the specified time period, the Department, at its option, may declare a default under the Standard Agreement and may seek legal remedies for the default including the following:
 - (1) The Department may seek, in a court of competent jurisdiction, an order for specific performance of the defaulted obligation or the appointment of a receiver to complete the Project in accordance with Program requirements.
 - (2) The Department may seek such other remedies as may be available under the relevant agreement or any law.
- (b) Funding commitments and Standard Agreements may be canceled by the Department under any of the following conditions:
 - (1) The objectives and requirements of the Program cannot be met by continuing the commitment or Standard Agreement;
 - (2) Construction of the Capital Improvement Project cannot proceed in a timely fashion in accordance with the timeframes established in the Standard Agreement; or
 - (3) Funding conditions have not been or cannot be fulfilled within required time periods.
- (c) Upon receipt of a notice of intent to cancel the grant from the Department, the Recipient shall have the right to appeal to the Director of the Department.

Section 314. Prevailing Wages

For the purposes of California's prevailing wage law (Lab. Code, 1720 et seq.), an IIG Capital Improvement Project (i.e., the construction, rehabilitation, demolition, relocation, preservation, acquisition, or other physical improvement of a Capital Asset) shall be considered a public work that is paid for in whole or in part out of public funds. As such, it is subject to California's prevailing wage law. Program funding of a Capital Improvement Project shall not necessarily, in and of itself, be considered public funding of a Qualifying Infill Project or the Qualifying Infill Area unless such funding is considered public funding under California's prevailing wage law.

Although the use of Program funds does not require compliance with the federal Davis-Bacon Act, other funding sources may require compliance with the federal Davis-Bacon Act 44.]

Infill Infrastructure Grant Program

Notice of Funding Availability (NOFA) May 12, 2021

Qualifying Infill Area (QIA) and Qualifying Infill Project (QIP) Application

Rev. 6/21/21



**State of California
Governor Gavin Newsom**

**Lourdes Castro Ramirez, Secretary
Business, Consumer Services and Housing Agency**

**Gustavo Velasquez, Director
Department of Housing and Community Development**

**2020 West El Camino Avenue, Suite 150
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Balboa Reservoir QIA Overview										6/21/21	
When opening this file, a yellow banner at the top may appear with a button that says "Enable Editing". It is essential that you click this box so that the macros are enabled. Enabling macros is necessary for full worksheet functionality. Macros may not work with Microsoft's Excel version for Apple Mac.											
Orange shaded areas are documents that must be submitted to HCD and/or uploaded to FAAST. Click here for FAAST upload instructions and user manual.											
Are you applying for funds for a Capital Improvement Project (CIP) within a Qualifying Infill Area (QIA) or for a Qualified Infill Project (QIP)?										QIA	
QIA Name: Balboa Reservoir QIA				County QIA is located: San Francisco		Geographic Region: Northern					
If QIA or QIP is also known under another name(s) or was formerly known under another name(s), provide the name(s).				Balboa Reservoir Building E							
Have you applied, do you plan to apply, or has the CIP, QIA or QIP been awarded other HCD program funds?										Yes	
Other HCD Program(s) Name(s):				Funding Amount		Funding Status		NOFA Date		Award Date/Expected Award Date	
AHSC Round 6 (Balboa Reservoir)				\$29,585,486		Application submitted		6/8/21		10/1/21	
Project or Area Information											
Does the QIA meet the definition and requirements in §302(aa) - A residential or mixed-use residential development project designated in the Program application that is located within an Urbanized Area on a site that has been previously developed, or on a vacant site where at least 75 percent of the perimeter of the site adjoins parcels that are developed with Urban Uses. A property is adjoining the side of a project site if the property is separated from the project site only by an improved public right-of-way.										Yes	
File Name		Site Plan		§308(a)(1) Provide documentation of compliance with §302(aa) certified by a California State-licensed professional such as an engineer, surveyor, or landscape architect.					Uploaded to HCD?		Yes
QIA - Provide the description of the Project Area including the designated housing within the QIA.											
This site is surrounded by a combination of leafy neighborhoods, multiple recreation centers, major employment hubs, transit hubs including BART and Muni Light Rail, shopping districts, and schools, the new residents in this community will have an abundance of walkable and bikeable amenities. The project area is bounded by Junipero Serra to the West, Mt Davidson to the North, and the Outer Mission to the South and East. The QIP lies adjacent to the City College of San Francisco, a major employer in the area.											
QIA - include all info for all QIPs.		For all QIA attachments, clearly identify and label the "Required QIP" documents						Docs identified for Required QIP?		Yes	
	QIP Name	QIP (Describe unit mix and tenant population)				QIP Address	QIP City	QIP Zip	Census Tract	APN	
Required QIP #1	Balboa Reservoir Building E	Balboa Reservoir Building E is a proposed new construction 128-unit Low Income Housing Tax Credit (LIHTC) development located at 11 Frida Kahlo Way, in San Francisco, California. The property will offer 127 affordable rental units restricted to households earning 30, 50 and 60 percent of the area median				11 Frida Kahlo Way	San Francisco	94112	6075031000	Block 3180/Lot 190	
	Balboa Reservoir Building A	Balboa Reservoir Building A is a proposed new construction 159-unit Low Income Housing Tax Credit (LIHTC) development located at 11 Frida Kahlo Way, in San Francisco, California. The property will offer 158 affordable rental units restricted to households earning 30, 50 and 60 percent of the area median				11 Frida Kahlo Way	San Francisco	94112	6075031000	Block 3180/Lot 190	
QIP #2											
QIP #3											
QIP #4											
QIP #5											
QIP(s) Names that CIP will support		Related CIP Description and Scope §304									
CIP(s) (Identify all if more than one)	Balboa Reservoir Building E		The CIP budget covers the infrastructure for the Balboa Reservoir Project, including site clearing, demolition, and grading. It also funds street and transportation improvements such as vehicular and pedestrian traffic safety measures, a low-pressure water system, a combined sewer system, stormwater management, and dry utility systems, all necessary for constructing Building E.								
	Balboa Reservoir Building A		The CIP budget covers the infrastructure for the Balboa Reservoir Project, including site clearing, demolition, and grading. It also funds openspace, street and transportation improvements such as vehicular, pedestrian, and bike lanes, traffic safety measures, a low-pressure water system, a combined sewer system, stormwater management, and dry utility systems, all necessary for constructing Building E.								
Is the required QIP a scattered site project?		No		If yes, complete the section below:							
Site Address						Homeowner or Rental					
Required QIP - Total Land Area in Acres:						0.763		Other QIP(s) - Total Land Area in Acres:		1.1	
Required QIP - Commercial Square Feet								Other QIP(s) - Commercial Square Feet			
Amenities within the required QIP											
Number of parking spaces	151	Gated site entry	Yes	Community room	Yes	Fitness room	Yes	Work Lounge			
Number of laundry rooms	0	Building card key	Yes	Community kitchen	No	Picnic/BBQ area	Yes				
Swimming pool	No	Security patrol	No	Computer room	No	Tot lot or playground	No				

Balboa Reservoir QIA Overview										6/21/21
Jacuzzi/Sauna	No	Security cameras	Yes	High speed internet	No	Sports/tennis court	No			
Eligible Applicant (Applicant) §302(k)										
Applicant #1										
Entity Name	City and County of San Francisco					Applicant Type	(2) City and county that have jurisdiction over the QIA			
Address	1 S Van Ness Avenue			City	San Francisco	State	CA	Zip	94103	
Auth Rep	Eric Shaw		Title	Director	Authorized Rep. Email	eric.shaw@sfgov.org		Phone	415-701-5500	
Contact	Sara Amaral		Title	Senior Project Manager	Email	sara.amaral@sfgov.org		Phone	415-701-5614	
Address	1 S Van Ness Avenue			City	San Francisco	State	CA	Zip	94103	
File Name	App1 Cert of BIPOC	See Applicant Documents worksheet.						Uploaded to HCD?	N/A	
File Name	App1 Cert & Legal	See Certification & Legal worksheet.						Uploaded to HCD?	Yes	
File Name	App1 Resolution	Signature required; see Applicant Documents worksheet.						Uploaded to HCD?	Yes	
File Name	App1 OrgDoc1, OrgDoc2, etc...	See Applicant Documents worksheet.						Uploaded to HCD?	N/A	
File Name	App1 OrgChart	See Applicant Documents worksheet.						Uploaded to HCD?	Yes	
File Name	App1 Signature Block	See Applicant Documents worksheet.						Uploaded to HCD?	Yes	
File Name	App1 Payee Data Record	See Applicant Documents worksheet.						Uploaded to HCD?	N/A	
File Name	App1 FISCAL TIN Form	See Applicant Documents worksheet.						Uploaded to HCD?	Yes	
File Name	App1 Cert of Good Standing	Certificate of Good Standing certified by Secretary of State prior to application due date.						Uploaded to HCD?	N/A	
File Name	App1 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.						Uploaded to HCD?	N/A	
Applicant #2										
Entity Name						Applicant Type				
Address				City		State		Zip		
Auth Rep			Title		Authorized Rep. Email			Phone		
Contact			Title		Email			Phone		
Address				City		State		Zip		
File Name	App2 Cert of BIPOC	See Applicant Documents worksheet.						Uploaded to HCD?		
File Name	App2 Cert & Legal	See Certification & Legal worksheet.						Uploaded to HCD?		
File Name	App2 Resolution	Signature required; see Applicant Documents worksheet.						Uploaded to HCD?		
File Name	App2 OrgDoc1, OrgDoc2, etc...	See Applicant Documents worksheet.						Uploaded to HCD?		
File Name	App2 OrgChart	See Applicant Documents worksheet.						Uploaded to HCD?		
File Name	App2 Signature Block	See Applicant Documents worksheet.						Uploaded to HCD?		
File Name	App2 Payee Data Record	See Applicant Documents worksheet.						Uploaded to HCD?		
File Name	App2 FISCAL TIN Form	See Applicant Documents worksheet.						Uploaded to HCD?		
File Name	App2 Cert of Good Standing	Certificate of Good Standing certified by Secretary of State prior to application due date.						Uploaded to HCD?		
File Name	App2 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.						Uploaded to HCD?		

Required Applicant Documentation		6/21/21
Black, Indigenous, and Other People of Color - Nonprofit Developer of a QIP		
A completed and signed letter of self-certification by authorized signatory is required for each Joint Applicant identifying as black, indigenous or other person of color. Each applicable Joint Applicant must sign an individual Certification.		
Certifications & Legal Disclosure		
A completed and signed Certification is required for each Joint Applicant. Each Joint Applicant must sign an individual Certification form. A completed and signed Legal Disclosure is also required for each Joint Applicant. The hard copy Certifications & Legal Disclosure should be submitted with the application as detailed in the NOFA.		
Resolutions		
Applicant may use their own Resolution format as long as it contains ALL of the authorizations as in the sample. The person attesting to the resolution signing cannot be the same person authorized to execute the documents in the name of the applicant. If more than one authorized signatory is identified, state whether both signatories are required or only one signatory is required to submit and execute Program docs. If the application is being signed by a designee of the authorized signatory, the applicant must also submit a designee letter or other proof of signing authority.		
A resolution is required of each Joint Applicant - both private and public entities. A sample resolution template is available on IIG website.		
Organizational Documents		
Organizational documents are required for all Applicants, except where a joint applicant is a governmental entity. Governmental entities are not required to submit organizational documents with the application. Submit organizational documents supporting the Resolution submitted with the application.		
Corporation organizational documents Articles of Incorporation (Corp. Code §154, 200 and 202) as certified by the CA Secretary of State. Bylaws and any amendments thereto (Corp. Code §207(b), 211 and 212) Certificate of Amendment of Articles of Incorporation (Corp. Code §900-910 (general stock), §5810-5820 (public benefit and religious corporations), §7810-7820 (mutual benefit corporations), or §12500-12510 (general cooperative corporations)) as applicable. Restated Articles of Incorporation (Corp. Code §901, 906, 910 (general stock), §5811, 5815, 5819 (public benefit and religious corporations), §7811, 7815 and 7819 (mutual benefit corporations) and §12501, 12506 and 12510 (general cooperative corporations)) as applicable. Statement of Information (CA Secretary of State form SI-100 or SI-200) Shareholder Agreements (Corp. Code §186) if applicable. Certificate of Good Standing certified by Secretary of State. Any other CA Secretary of State filings applicable to revivals, conversions or mergers.		
Limited Liability Company organizational documents Articles of Organization (CA Secretary of State form LLC-1) Certificate of Amendment (CA Secretary of State form LLC-2) if applicable. Restated Articles of Organization (CA Secretary of State form LLC-10) if applicable. Certificate of Correction (CA Secretary of State form LLC-11) if applicable. Statement of Information (CA Secretary of State form LLC-12 or LLC-12NC) Operating Agreement (Corp. Code §17707.02(s) and 17701.10.) Certificate of Good Standing certified by Secretary of State. Any other CA Secretary of State filings applicable to revivals, conversions or mergers.		
Limited Partnership organizational documents Certificate of Limited Partnership (CA Secretary of State form LP-1) Amendment to Certificate of Limited Partnership (CA Secretary of State form LP-2) if applicable. Certificate of Correction (CA Secretary of State form LP-2) if applicable. Limited Partnership Agreement (CA Corp. Code §15901.02(x) and 15901.10) Certificate of Good Standing certified by Secretary of State. Any other CA Secretary of State filings applicable to revivals, conversions or mergers.		
Organizational Chart		
The Organizational chart must depict the organizational structure of the entities in relation to the applicant.		
Signature Block		
All Applicants must submit a Signature Block in a Microsoft Word Document that will be used in the HCD legal documents such as the Standard Agreement.		
Payee Data Record STD-204 or Taxpayer Identification Number (TIN)		
The TIN must be submitted by all governmental entity Applicants. All other Applicants must submit the STD-204 Payee Data Record. Forms available on IIG website.		

Balboa Reservoir QIA Project Narrative

6/21/21

1. Summarize the scope of work for the CIP(s). Describe the distinct infrastructure improvements relating to utilities, surface improvements, landscape and amenities, environmental mitigation and remediation, replacement transit, residential parking and/or transit, etc. §304:

The work for the CIP includes the demolition, grading, street and transportation improvements, (vehicular, pedestrian, and bike lanes), open space improvements, a low pressure water system, combined sewer system, stormwater management, and dry utility systems.

2. Describe all on-site services that will be provided at the required QIP:

Balboa Reservoir Building E is a proposed new construction 128-unit affordable development that will include a mix of one bedrooms, two bedrooms, and three bedrooms. Amenities include community room and outdoor areas.

3. Explain any specific development issues (relocation, environmental, historical, topography, etc.) at the required QIP and/or CIP(s):

The Balboa Reservoir 17-acre master development site is host to a variety of uses including parking for City College, a motorcycle training school, urban wildlife habitat, and a neighborhood dog walking destination. In order to plan for the development of this parcel the City of San Francisco has guided the neighborhood through an intensive community engagement process. The Balboa Reservoir neighborhood has been engaged in community planning efforts since the beginning of the Balboa Area Station Plan in 2000. Following the selection of Balboa Reservoir as a Public Lands for Housing site in 2014, City staff participated in over 30 public meetings to seek feedback on the community's priorities for the site's development. In the spring of 2015, the Board of Supervisors created the Balboa Reservoir Community Advisory Committee (BRCAC), consisting of seven members appointed by the Mayor and the District 7 Supervisor and two representatives of local neighborhood associations. The BRCAC has served as the primary forum for community feedback during the creation of the project's principles and parameters which the BRCAC endorsed in September 2016. These principles informed the programming goals included in the Request for Proposals issued by the City and SFPUC in 2017. Following the proposal and selection process of BRIDGE, the Reservoir neighborhood project sponsors collaborated with the BRCAC to lead a community process to shape the master plan for the Reservoir. This phase of the community process included eight meetings with the BRCAC, two on-site tours, two community-wide open house events, and multiple meetings with individuals and community groups. This engagement process also included ongoing meetings and coordination with City College, as well as city agencies.

4. Explain any required demolition at the required QIP:

Not applicable

5. Identify the Developer(s) for the required QIP. Describe Developer(s) experience with affordable housing:

BRIDGE Housing Corporation is a leading affordable housing developer, owner and property manager in California for over 40 years. BRIDGE has extensive experience with developing affordable housing, including complicated public private partnerships and master developments, and the ability to develop complicated large scale master plan projects and transit oriented developments with multiple Local, State and Federal funding sources.

San Francisco

AMI	Units	%
60%	138	#####
55%	0	0.00%
50%	76	#####
45%	0	0.00%
40%	0	0.00%
35%	0	0.00%
30%	71	#####
25%	0	0.00%
20%	0	0.00%
15%	0	0.00%
Total	285	#####
Below 20%		0.00%

Balboa Reservoir QIA Eligibility and Threshold										6/21/21				
Eligible Projects §303														
(a) Is the CIP an integral part of, or necessary for the development of a QIP or housing designated within a QIA?										Yes				
File Name	CIP Integral to QIP	Applicant narrative and documentation evidencing the Locality requiring the CIP.						Uploaded to HCD?	Yes					
(c)(1) Is QIA located in an Urbanized Area? Yes - defined by the U.S Census Bureau														
File Name	Urban Area	Provide documentation of location in an Urbanized Area. §302(II)						Uploaded to HCD?	Yes					
(c)(2) Is QIA located in a Locality that has an adopted housing element in substantial compliance with Art. 10.6 (§65580) Ch. 3 Div. 1 of Title 7 (Gov. Code §65585)?										Yes				
A jurisdiction's current housing element compliance status is obtainable thru HCD's website.														
(c)(2)(A) QIA located in a Locality at time of application that has submitted its housing element annual progress reports (required by Gov. Code §65400) for the current and prior year.														
(c)(3) Does QIA include 15% or more Affordable Units (AU) excluding replacement units?														
Total AUs (excluding replacement unit AUs) 285										Total Units 287	Yes			
Required QIP:	Rental AUs	127	HO AUs	0	Rental AUs to be replaced		HO AUs to be replaced		Net QIP AUs	127	Total QIP Units	128		
Other-QIPs (QIA only)	Rental AUs	158	HO AUs	0	Rental AUs to be replaced		HO AUs to be replaced		Net other-QIP AUs	158	Total other-QIP Units	159		
File Name	Replacement Housing Plan	Provide the Replacement Housing Plan if there will be replacement units						Uploaded to HCD?	N/A					
(c)(3) Does QIA have a disposition and development agreement or other specific agreement executed on or before August 24, 2007 between the Developer and the local agency having jurisdiction over the project that includes affordability covenants that subject the QIA to the production of Affordable Units for Very Low-, Lower- or Moderate-Income households?														
File Name	Development Agreement	Agreement executed prior to August 24, 2007 that contains affordability covenants.						Uploaded to HCD?	N/A					
(c)(4) Average Net Density (dwelling units per acre)														
Are parcels to be developed within a Rural Area per §302(ee)? (Refer to the document entitled IIG Program. Rural Area Determination Procedures)										No	If yes (project is Rural), parcels to be developed must have a Net Density of 10 units per acre.	0		
If non-Rural, enter minimum Net Density for parcels to be developed per Locality (see Appendix 1, click here):										30	Net Density: housing units per acre	180.0	Is the QIA Net Density equal to or greater than required §303(c)(4)?	Yes
Total QIA site area in square feet		81,065		Non-qualified site deductions: utility easements, setbacks, private drives/walkways, landscaping, common areas and facilities, off street parking, drainage facilities exclusive to a development project & other related mitigation space required.				0 bedroom Net Density calculation		12				
Less QIA qualified site deductions* in square feet								1 bedroom Net Density calculation		92				
Public streets								2 bedroom Net Density calculation		113				
Public sidewalks								3 bedroom Net Density calculation		118				
Public Open Space								4 bedroom Net Density calculation		0				
Public drainage facilities				If QIA contains commercial, answer V24-25 Square ft. of largest residential unit				Commercial Net Density calculation		0	Commercial square feet	0		
Net site area in acres (43,560 square feet per acre)		1.86		0.7		# of bedrooms in largest unit		QIA adjusted Net Density as a percentage of required density §309(c)(2)		599.86%				
(c)(5) Is QIA located in area designated for mixed-use or residential development pursuant to one of the following plans? If Yes, select plan.														
(B) A project area redevelopment plan adopted pursuant to the Health and Safety Code §33330.														
File Name	Relevant Development Plan	Provide, label and attach a copy of the relevant plan showing area designation.						Uploaded to HCD?	Yes					
(c)(6) Can the Applicant identify a mechanism, such as a minimum density ordinance or a recorded, binding covenant, to reliably ensure that future development will occur at an overall Net Density set forth in §303(c)(4)? This mechanism must be in effect and legally enforceable prior to the disbursement of Program funds.														
File Name	Net Density Verification	Provide a minimum density ordinance, recorded binding covenant or date stamped map and letter certified by a California State-licensed professional such as an engineer, surveyor or landscape architect confirming the Net Density.						Uploaded to HCD?	Yes					
(c)(7) Will the Applicant designate the proposed residential units in the QIP, and/or within the QIA (non-QIP), that the Applicant intends to utilize for the purpose of establishing the max Program grant amount pursuant to §305, and for the purpose of rating applications pursuant to §309 or §310.														
(c)(8) Does this application demonstrate that the percentage of Affordable Units (AUs), and units restricted to other income limits and rents as designated for the purpose of determining the max Program grant amount shall be maintained or exceeded through the completion of each proposed residential development?														
(c)(9) Applicant certifies construction shall not have commenced on any units designated in the application prior to the application submittal deadline?														
File Name	Construction exception	If applicable, label and attach agreement requiring AUs be built as a local approval condition.						Uploaded to HCD?	N/A					
Eligible Costs §304														
(a)(4)(A) Total number of Structured Parking spaces - that are (1) required replacement of Transit Station parking spaces or (2) public Structured Parking required as a condition of approval for the QIP within one-half mile of a Major Transit Stop or Transit Station:										0	Are costs less than or equal to \$50,000 per parking space?			
(a)(4)(B) Total number of residential per unit parking spaces in Structured Parking, as required by local land-use entitlement approval, not to exceed one parking space per residential unit, and not to exceed \$50,000 per permitted space:										0	Are costs less than or equal to \$50,000 per parking space?			
(a)(15) Impact fees for the CIP are required by local ordinance?										Yes	If Yes, impact fees do not to exceed 5% of the total Program grant amount? Describe below the fee(s), Locality and how the impact fee(s) will be used for the CIP:			
Impact fees include, but are not limited to, Job's/Housing fee, Street Tree Fees, Transportation Sustainability fees, Water fees, Waste Water fees, School fees, and Community Infrastructure Impact fees.														
We certify the CIP funded costs do not include any of the following ineligible costs:														
(b)(1) Developer Fees or profit.										Yes				
(b)(2) Costs of site acquisition for housing and mixed use structural improvements.														
(b)(3) Costs of housing or mixed use structures.														
(b)(4) Soft costs related to ineligible costs.														
(b)(5) In lieu fees for local inclusionary programs.														
Application Threshold Requirements - §308														
(a)(2) We certify that construction of the CIP has not commenced as of the application deadline set forth in the NOFA?														
(a)(3) We certify the CIP is infeasible without Program funds, and other available funds are not and will not be supplanted by Program funds?														
(a)(4) Does Applicant have Site Control §302(gg) for the CIP Project? If Yes, enter form of Site Control and the most recent execution date below.														
Form of Site Control §302(gg):										Enforceable Option to Lease or Purchase	Most recent document execution date:	2/18/21		
(a)(5) We certify all proposed uses of Program funds must be eligible pursuant to §304?														
(b) Is application sufficiently complete to assess feasibility of application and its compliance with Program requirements?														
Describe any special circumstances:														
N/A														
File Name	CIP Site Control	Appropriate documentation to demonstrate the form of Site Control indicated above.						Uploaded to HCD?	Yes					
Does the required QIP trigger State Relocation Assistance Law (CA Gov Code §7260-7277)?														
No														

Balboa Reservoir QIA Eligibility and Threshold											6/21/21
If Yes, provide a narrative discussion on the number of impacted households and provided relocation assistance including what actions have or will be taken to comply with State Relocation Assistance Law? If No, provide documentation supporting relocation is not required.				The QIP is being built on a parcel that is vacant and cleared, as shown in the satellite image uploaded as "QIP Relocation Plan".							
File Name	QIP Relocation Plan			Must provide a Relocation Plan or documentation supporting no relocation.						Uploaded to HCD?	Yes
(c) We certify we will comply with all state and federal fair housing laws. Compliance with state law includes but is not limited to the duty to carry out the program in a manner to affirmatively further fair housing, and take no action that is materially inconsistent with Affirmatively Furthering Fair Housing pursuant to CA Gov Code §8899.50?											Yes
File Name	Fair Housing Self-Certification			Must provide a self-certification document that is acceptable to HCD certifying that the Occupancy restrictions will be carried out in a manner that is consistent with federal fair housing laws						Uploaded to HCD?	Yes
Market Study											
Does Market study demonstrate QIP is financially feasible? - <i>Must submit a market study that meets the requirements specified in TCAC Regs §10322(h)(10)</i>											Yes
File Name	Market Study			Must provide a completed market study prepared within one year of the application due date.						Uploaded to HCD?	Yes
Tax Credits (TC)											
Select appropriate entry for each item:											
Project Tax Credit Type	N/A										
File Name	Tax Credit Reservation			If the Project has already received a tax credit reservation, upload documentation.						Uploaded to HCD?	N/A
Milestones											
What covenants or regulatory agreements are already on title?				None							
What covenants or regulatory agreements are anticipated?				None							
Note: Some of the following milestones may have already been achieved. For previously met milestones, please enter the month and year completed. For those milestones not yet completed, please provide a projected completion date (MM/YY) for each of the applicable items below. If not applicable to the specific Capital Project, please indicate "NA" below.											
Provide the actual or anticipated completion date for the following performance milestones for the CIP. If a milestone is not applicable, please enter "N/A".											
									CIP Date	QIP Date	
Executed binding agreement between Applicant and Developer of the proposed QIP detailing the terms and conditions of the development.										8/28/20	
Completion of all necessary environmental clearances, including those required under CEQA and NEPA.									8/28/20	8/28/20	
Obtaining all necessary and discretionary public land use approvals.									8/28/20	8/28/20	
Obtaining enforceable commitments for all construction/permanent financing described in the Sources and Uses including substantially final construction/permanent loan documents, and Tax Credit syndication documents for remaining phases of Project.									6/1/25	6/1/25	
Submission of Final Construction Drawings and Specifications to the appropriate local building department or permitting authority.									10/15/24	10/15/24	
Commencement of construction.									6/15/25	6/15/25	
Construction complete and the filing of the Notice of Completion.									6/15/27	6/15/27	

See §310(a)(4) for an explanation of funding commitments

QIP (Required by QIA) and all CIPs Construction Period Sources of Funds															
Funding Committed by Application Due Date?		Unit Type	CIP or QIP #1	Source Name (listed in order of lien priority)	Source Type	Local Support \$310(a)(5)	Lien No.	Residential Amount	Commercial Amount	Total Amount	Interest Rate	Required Payment	Loan Term (months)	*Details of Deferred Costs	
														Amount	Description
1	Yes	Rental	CIP	IIG CIP Grant	State-HCD	No	1	\$20,095,616		\$20,095,616					
2	Yes	Rental	QIP #1	Construction Loan	Private	No		\$77,756,160		\$77,756,160					
3	Yes	Rental	QIP #1	MOHCD Gap Financing	Local	Yes		\$13,594,128		\$13,594,128					
4	Yes	Rental	CIP	29 Sunset Muni Forward	Local	Yes		\$8,750,000		\$8,750,000					
5	Yes	Rental	QIP #1	LP Equity	Private	No		\$3,384,895		\$3,384,895					
6	Yes	Rental	QIP #1	Joint Venture Partner Subsidy loan	Private	No		\$6,134,258		\$6,134,258					
7	No	Rental	CIP	MOHCD Gap Financing for CIP	Local	Yes		\$5,904,384		\$5,904,384					
8										\$0					
9										\$0					
10										\$0					
11										\$0					
12										\$0					
13										\$0					
14										\$0					
15										\$0					
16										\$0					
17										\$0					
18										\$0					
19										\$0					
20		Rental	QIP #1	Deferred costs (detail at right)				\$0		\$0					
21	No	Rental	QIP #1	Equity investor						\$0					
		\$129,715,057	<Total funds committed		95.65%	<% Funds committed		TOTALS	\$135,619,441	\$0	\$135,619,441			\$0	
128	<Rental Units	\$129,715,057	<Total Rental funds committed		95.65%	<% Rental funds committed									
0	<HO Units	\$0	<Total HO funds committed		0.00%	<% HO funds committed									
		\$28,845,616	<Total CIP funds committed		83.01%	<% Funds committed									

QIPs (excluding the required QIP above) Construction Period Sources of Funds														
Funding Committed by Application Due Date?	Unit Type	QIP #2, 3, 4 or 5	Source Name (listed in order of lien priority)	Source Type	Local Support \$310(a)(5)	Lien No.	Residential Amount	Commercial Amount	Total Amount	Interest Rate	Required Payment	Loan Term (months)	*Details of Deferred Costs	
													Amount	Description
1	No	Rental	QIP #2	Construction Loan	Private	No	\$118,202,325		\$118,202,325					
2	No	Rental	QIP #2	MOHCD Gap Financing	Local	Yes	\$14,000,000		\$14,000,000					
3	No	Rental	QIP #2	Deferred Developer Fee	Private	No	\$1,300,000		\$1,300,000					
4	No	Rental	QIP #2	GP Equity	Private	No	\$15,346,318		\$15,346,318					
5	No	Rental	QIP #2	LP Equity	Private	No	\$7,620,228		\$7,620,228					
6									\$0					
7									\$0					
8									\$0					
9									\$0					
10									\$0					
11									\$0					
12									\$0					
13									\$0					
14									\$0					
15									\$0					
16									\$0					
17									\$0					
18									\$0					
19									\$0					
20			All QIPs	Deferred costs (detail at right)			\$0		\$0					
21			All QIPs	Equity Investor					\$0					
	\$0	<Total funds committed		0.00%	<% Funds committed		TOTALS	\$156,468,871	\$0	\$156,468,871			\$0	

QIP (Required by QIA) and all CIP Permanent Sources of Funds																
Funding Committed by Application Due Date?		Rental vs Homeowner (HO)	CIP or QIP #1	Source Name (listed in order of lien priority)	Source Type	Local Support §310(a)(5)	Lien No.	Residential Amount	Commercial Amount	Total Amount	Interest Rate		Repayment Terms		Required Residential Debt Service	Required Commercial Debt Service
											Type	Rate	Type	Due in (yrs)		
1	Yes	Rental	CIP	IIG CIP Grant	State-HCD	No	1	\$20,095,616		\$20,095,616						
2	Yes	Rental	QIP #1	Permanent Loan	Private	No		\$21,591,000		\$21,591,000						
3	Yes	Rental	CIP	29 Sunset Muni Forward	Local	Yes		\$8,750,000		\$8,750,000						
4	Yes	Rental	QIP #1	MOHCD Gap Financing	Local	Yes		\$13,594,128		\$13,594,128						
5	Yes	Rental	QIP #1	LP Equity	Private	No		\$33,848,946		\$33,848,946						
6	Yes	Rental	QIP #1	GP Equity	Private	No		\$9,044,095		\$9,044,095						
7	Yes	Rental	QIP #1	Deferred Developer Fee	Private	No		\$1,300,000		\$1,300,000						
8	Yes	Rental	QIP #1	Joint Venture Partner Subsidy loan	Private	No		\$6,134,358		\$6,134,358						
9	No	Rental	CIP	MOHCD Gap Financing for CIP	Local	Yes		\$5,904,384		\$5,904,384						
10	No	Rental	QIP #1	AHP	Private	No		\$1,230,000		\$1,230,000						
12	No	Rental	QIP #1	AHSC AHD Funds	State-HCD	No		\$19,610,404		\$19,610,404						
12										\$0						
13										\$0						
14			QIP #1	Private mortgage financing	Private	No				\$0						
15			QIP #1	Deferred costs						\$0						
16			QIP #1	Equity Investor						\$0						
					TOTALS				\$141,102,931	\$0	\$141,102,931	TOTALS			\$0	\$0
128	<Rental Units	\$85,512,527	<Total QIP Rental funds committed		80.40%	<% QIP Rental funds committed										
0	<HO units	\$0	<Total QIP HO funds committed		0.00%	<% QIP HO funds committed										
Applicant comments: Include a description of balloon payments and unusual or extraordinary circumstances that have resulted in higher than expected project costs and provide a justification as to why these costs are reasonable.																

Balboa Reservoir QIA QIP (Required by QIA) Residential and all CIP Permanent Sources of Funds																	6/21/21	Commercial Sources		
USES OF FUNDS	IIG CIP Grant	Permanent Loan	29 Sunset Muni Forward	MOHCD Gap Financing	LP Equity	GP Equity	Deferred Developer Fee	Joint Venture Partner Subsidy loan	MOHCD Gap Financing for CIP	AHP	AHSC AHD Funds	0	0	Private mortgage financing	Deferred costs	Equity Investor	Total Residential Sources/Costs	Total Commercial Sources/Costs	Source Name:	Source Name:
Required QIP (QIA applications only)																				
LAND COST/ACQUISITION																				
Land Cost or Value					\$4,092,000												\$4,092,000	\$0		
Demolition																	\$0	\$0		
Legal																	\$0	\$0		
Land Lease Rent Prepayment					\$79,900												\$79,900	\$0		
Total Land Cost or Value		\$0	\$0	\$0	\$4,171,900	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$4,171,900	\$0	\$0	\$0
Existing Improvements Cost or Value																	\$0	\$0		
Off-Site Improvements					\$2,839,170												\$2,839,170	\$0		
Total Acquisition Cost		\$0	\$0	\$0	\$2,839,170	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,839,170	\$0	\$0	\$0
Total Land Cost / Acquisition Cost		\$0	\$0	\$0	\$7,011,070	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$7,011,070	\$0	\$0	\$0
Predevelopment Interest/Holding Cost					\$100,000												\$100,000	\$0		
Assumed, Accrued Interest on Existing Debt (Rehab/Acq)																	\$0	\$0		
Excess Purchase Price Over Appraisal																	\$0	\$0		
Total Relocation Costs																	\$0	\$0		
NEW CONSTRUCTION																				
Site Work					\$694,695												\$694,695	\$0		
Structures		\$21,591,000		\$13,594,128	\$774,214			\$6,134,358		\$1,230,000	\$19,610,404						\$62,934,104	\$0		
General Requirements																	\$0	\$0		
Contractor Overhead																	\$0	\$0		
Contractor Profit																	\$0	\$0		
Prevailing Wages																	\$0	\$0		
General Liability Insurance																	\$0	\$0		
Urban Greening																	\$0	\$0		
Other New Construction: Solar Photovoltaic Systems					\$683,730												\$683,730	\$0		
Other New Construction: Security					\$125,000												\$125,000	\$0		
Other New Construction: (Specify)																	\$0	\$0		
Total New Construction		\$21,591,000	\$0	\$13,594,128	\$2,277,639	\$0	\$0	\$6,134,358	\$0	\$1,230,000	\$19,610,404	\$0	\$0	\$0	\$0	\$0	\$64,437,529	\$0	\$0	\$0
ARCHITECTURAL FEES																				
Design					\$1,574,689												\$1,574,689	\$0		
Supervision					\$200,000												\$200,000	\$0		
Total Architectural		\$0	\$0	\$0	\$1,774,689	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,774,689	\$0	\$0	\$0
Total Survey & Engineering					\$913,790												\$913,790	\$0		
CONSTRUCTION INTEREST & FEES																				
Construction Loan Interest					\$6,551,541												\$6,551,541	\$0		
Origination Fee					\$413,917												\$413,917	\$0		
Credit Enhancement/Application Fee					\$0												\$0	\$0		
Bond Premium					\$0												\$0	\$0		
Cost of Issuance					\$535,360												\$535,360	\$0		
Title & Recording					\$50,000												\$50,000	\$0		
Taxes					\$185,120												\$185,120	\$0		
Insurance					\$1,277,272												\$1,277,272	\$0		
Employment Reporting					\$0												\$0	\$0		
Other Construction Int. & Fees: Construction Expenses and General Costs					\$30,000												\$30,000	\$0		
Other Construction Int. & Fees: Lender Expenses					\$40,000												\$40,000	\$0		
Other Construction Int. & Fees: (Specify)																	\$0	\$0		
Other Construction Int. & Fees: (Specify)																	\$0	\$0		
Total Construction Interest & Fees		\$0	\$0	\$0	\$9,083,210	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$9,083,210	\$0	\$0	\$0
PERMANENT FINANCING																				
Loan Origination Fee					\$161,933												\$161,933	\$0		
Credit Enhancement/Application Fee					\$0												\$0	\$0		
Title & Recording					\$20,000												\$20,000	\$0		
Taxes					\$0												\$0	\$0		
Insurance					\$0												\$0	\$0		
Other Perm. Financing Costs: Lender Expenses and General Costs					\$25,000												\$25,000	\$0		
Other Perm. Financing Costs: (Specify)																	\$0	\$0		
Other Perm. Financing Costs: (Specify)																	\$0	\$0		
Other Perm. Financing Costs: (Specify)																	\$0	\$0		
Total Permanent Financing		\$0	\$0	\$0	\$206,933	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$206,933	\$0	\$0	\$0
Subtotals Forward		\$21,591,000	\$0	\$13,594,128	\$21,367,331	\$0	\$0	\$6,134,358	\$0	\$1,230,000	\$19,610,404	\$0	\$0	\$0	\$0	\$0	\$83,527,221	\$0	\$0	\$0
LEGAL FEES																				
Legal Paid by Applicant					\$60,000												\$60,000	\$0		
Other Attorney Costs: (Specify)					\$15,000												\$15,000	\$0		
Other Attorney Costs: (Specify)					\$7,500												\$7,500	\$0		
Other Attorney Costs: (Specify)					\$49,000												\$49,000	\$0		
Total Legal Fees		\$0	\$0	\$0	\$131,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$131,500	\$0	\$0	\$0

Balboa Reservoir QIA QIP (Required by QIA) Residential and all CIP Permanent Sources of Funds																	6/21/21	Commercial Sources		
USES OF FUNDS	IIG CIP Grant	Permanent Loan	29 Sunset Muni Forward	MOHCD Gap Financing	LP Equity	GP Equity	Deferred Developer Fee	Joint Venture Partner Subsidy loan	MOHCD Gap Financing for CIP	AHP	AHSC AHD Funds	0	0	Private mortgage financing	Deferred costs	Equity Investor	Total Residential Sources/Costs	Total Commercial Sources/Costs	Source Name:	Source Name:
RESERVES																				
Operating Reserve					\$679,995												\$679,995	\$0		
Replacement Reserve																	\$0	\$0		
Transition Reserve																	\$0	\$0		
Rent Reserve																	\$0	\$0		
Other Reserve Costs: (Specify)																	\$0	\$0		
Other Reserve Costs: (Specify)																	\$0	\$0		
Other Reserve Costs: (Specify)																	\$0	\$0		
Total Reserves		\$0	\$0	\$0	\$679,995	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$679,995	\$0	\$0	\$0
CONTINGENCY COSTS																				
Construction Hard Cost Contingency					\$6,715,170												\$6,715,170	\$0		
Soft Cost Contingency					\$649,274												\$649,274	\$0		
Total Contingency		\$0	\$0	\$0	\$7,364,444	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$7,364,444	\$0	\$0	\$0
OTHER PROJECT COSTS																				
TCAC App/Allocation/Monitoring Fees					\$90,309												\$90,309	\$0		
Environmental Audit					\$15,000												\$15,000	\$0		
Local Development Impact Fees					\$813,440												\$813,440	\$0		
Permit Processing Fees					\$331,177												\$331,177	\$0		
Capital Fees					\$0												\$0	\$0		
Marketing					\$238,750												\$238,750	\$0		
Furnishings					\$248,000												\$248,000	\$0		
Market Study					\$10,000												\$10,000	\$0		
Accounting/Reimbursable					\$0												\$0	\$0		
Appraisal Costs					\$10,000												\$10,000	\$0		
Other Costs: Soft Costs					\$0												\$0	\$0		
Other Costs: Audit/Cost Certification					\$124,000												\$124,000	\$0		
Other Costs: Printing					\$50,000												\$50,000	\$0		
Other Costs: Syndication Consultant					\$25,000												\$25,000	\$0		
Other Costs: Construction Supervision					\$75,000												\$75,000	\$0		
Other Costs: (Specify)					\$75,000												\$75,000	\$0		
Total Other		\$0	\$0	\$0	\$2,105,676	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,105,676	\$0	\$0	\$0
Subtotal Project Costs		\$21,591,000	\$0	\$13,594,128	\$31,648,946	\$0	\$0	\$6,134,358	\$0	\$1,230,000	\$19,610,404	\$0	\$0	\$0	\$0	\$0	\$93,808,836	\$0	\$0	\$0
DEVELOPER COSTS																				
Developer Overhead/Profit					\$2,200,000	\$9,044,095	\$1,300,000										\$12,544,095	\$0		
Consultant/Processing Agent																	\$0	\$0		
Project Administration																	\$0	\$0		
Broker Fees Paid to a Related Party																	\$0	\$0		
Construction Oversight by Developer																	\$0	\$0		
Other Developer Costs: (Specify)																	\$0	\$0		
Total Developer Costs	\$0	\$0	\$0	\$0	\$2,200,000	\$9,044,095	\$1,300,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$12,544,095	\$0	\$0	\$0
TOTAL PROJECT COST	\$0	\$21,591,000	\$0	\$13,594,128	\$33,848,946	\$9,044,095	\$1,300,000	\$6,134,358	\$0	\$1,230,000	\$19,610,404	\$0	\$0	\$0	\$0	\$0	\$106,352,931	\$0	\$0	\$0
Capital Improvement Project(s) (CIP)																				
Site acquisition of CIP including easements and right of ways																	\$0			
Other:																	\$0			
Total Site Acquisition (not parking)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
Clearing and Grubbing																	\$0			
Demolition	\$1,057,955																\$1,057,955			
Excavation																	\$0			
Grading	\$2,916,880																\$2,916,880			
Soil Stabilization (Lime, etc.)																	\$0			
Erosion/Weed Control																	\$0			
Dewatering																	\$0			
Other:																	\$0			
Other:																	\$0			
Total Site Preparation	\$3,974,835	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3,974,835			
Sanitary Sewer	\$874,903																\$874,903			
Potable Water	\$1,210,000																\$1,210,000			
Non-Potable Water	\$3,380,000																\$3,380,000			
Storm Drain	\$545,045								\$5,904,384								\$6,449,429			
Detention Basin/Culverts																	\$0			
Joint Trench	\$1,335,000																\$1,335,000			
Other: Site Clearing	\$688,445																\$688,445			
Total Site Utilities	\$8,033,393	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$5,904,384	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$13,937,777			

Balboa Reservoir QIA QIP (Required by QIA) Residential and all CIP Permanent Sources of Funds																	6/21/21	Commercial Sources		
USES OF FUNDS	IIG CIP Grant	Permanent Loan	29 Sunset Muni Forward	MOHCD Gap Financing	LP Equity	GP Equity	Deferred Developer Fee	Joint Venture Partner Subsidy loan	MOHCD Gap Financing for CIP	AHP	AHSC AHD Funds	0	0	Private mortgage financing	Deferred costs	Equity Investor	Total Residential Sources/Costs	Total Commercial Sources/Costs	Source Name:	Source Name:
Aggregate Base	\$477,426																\$477,426			
Asphalt Pavement	\$352,000																\$352,000			
Curb, Gutter, Sidewalk	\$1,186,250																\$1,186,250			
Street Lights	\$1,024,617																\$1,024,617			
Striping/Signage/Barricades	\$408,810																\$408,810			
Traffic Mitigation																	\$0			
Other:	\$1,198,291																\$1,198,291			
Total Surface Improvements	\$4,647,394	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$4,647,394			
Irrigation	\$3,193,958																\$3,193,958			
Concrete Work																	\$0			
Landscaping																	\$0			
Urban Greening																	\$0			
Playground Facilities and Tot Lots																	\$0			
Walking/Bike Path																	\$0			
Drinking Fountains																	\$0			
Structures																	\$0			
Lighting																	\$0			
Open Space																	\$0			
Other:																	\$0			
Total Parks-Landscape and Amenities	\$3,193,958	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3,193,958			
Wetland Mitigation																	\$0			
Endangered Species																	\$0			
Tree Mitigation																	\$0			
Environmental Remediation	\$246,036																\$246,036			
Other:																	\$0			
Total Env. Mitigation/Remediation	\$246,036	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$246,036			
Replacement Parking																	\$0			
Grading																	\$0			
Foundation Work																	\$0			
Site Work																	\$0			
Other:																	\$0			
Other:																	\$0			
Total Structured Parking §304(a)(4)(A)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
Residential Parking Structures																	\$0			
Grading																	\$0			
Foundation Work																	\$0			
Site Work																	\$0			
Other:																	\$0			
Other:																	\$0			
Total Residential Parking §304(a)(4)(B)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
Access Plazas																	\$0			
Pathways																	\$0			
Bus Shelters																	\$0			
Transit Shelters																	\$0			
Pedestrian Facilities																	\$0			
Bicycle Facilities																	\$0			
Other: Bus Improvements			\$8,750,000														\$8,750,000			
Total Transit	\$0	\$0	\$8,750,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$8,750,000			
Drainage																	\$0			
Parks & Recreation																	\$0			
Streets/Signals																	\$0			
Traffic Fees																	\$0			
Waste Water																	\$0			
Water Facility																	\$0			
Other:																	\$0			
Other:																	\$0			
Total Impact Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
Engineering																	\$0			
Design																	\$0			
Other:																	\$0			
Other:																	\$0			
Total Soft Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
Other:																	\$0			
Other:																	\$0			
Total Other Asset Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
CIP TOTAL PROJECT COSTS	\$20,095,616	\$0	\$8,750,000	\$0	\$0	\$0	\$0	\$0	\$5,904,384	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$34,750,000			
QIP TOTAL PROJECT COSTS	\$0	\$21,591,000	\$0	\$13,594,128	\$33,848,946	\$9,044,095	\$1,300,000	\$6,134,358	\$0	\$1,230,000	\$19,610,404	\$0	\$0	\$0	\$0	\$0	\$106,352,931			
TOTAL QIP & CIP PROJECT COSTS	\$20,095,616	\$21,591,000	\$8,750,000	\$13,594,128	\$33,848,946	\$9,044,095	\$1,300,000	\$6,134,358	\$5,904,384	\$1,230,000	\$19,610,404	\$0	\$0	\$0	\$0	\$0	\$141,102,931			

Required QIP Annual Income and Expenses

Employee Information					Comments
No.	FTE	Employee Job Title	Salary/Wages	Value of Free Rent	
		On-Site Manager(s)	\$62,000	\$0	
		On-Site Assistant Manager(s)	\$0	\$0	
		Supportive Services Staff Supervisor(s)	\$0		
		Supportive Services Coordinator, On-Site	\$60,000		
		Other Supportive Services Staff (inc. Case Manager)	\$0		
		On-Site Maintenance Employee(s)	\$0	\$0	
		On-Site Leasing Agent/Administrative Employee(s)	\$42,440	\$0	
		On-Site Security Employee(s)		\$0	
		Janitor	\$37,940	\$0	
		Repairs	\$47,840	\$0	
Total Salaries and Value of Free Rent Units			\$250,220	\$0	
	6711	Payroll Taxes	\$19,022	Show free rent as an expense?	
	6722	Workers Compensation	\$17,120		
	6723	Employee Benefits	\$53,618		Yes
Employee(s) Payroll Taxes, Workers Comp. & Benefits			\$89,760		
Total Employee(s) Expenses			\$339,980		
Employee Units					
Income Limit	Job Title(s) of Employee(s) Living On-Site		Unit Type (No. of bdrms.)	Square Footage	
	On-Site Manager(s)		2	900	
			0	0	
			0	0	
Total Square Footage				900	
Annual Operating Budget					
Acct. No.	Revenue - Income	Residential	Commercial	Comments	
5120/5140	Rent Revenue - Gross Potential		\$0		
	Restricted Unit Rents	\$3,026,940			
	Unrestricted Unit Rents	\$0			
5121	Tenant Assistance Payments				
	Subsidy Program Name	\$0			
	Subsidy Program Name	\$0			
	Operating Subsidies	\$0			
	Other: (specify)	\$0	\$0		
5910	Laundry and Vending Revenue	\$25,000			
5170	Garage and Parking Spaces		\$0		
5990	Miscellaneous Rent Revenue		\$0		
Gross Potential Income (GPI)		\$3,051,940	\$0		
	Vacancy Rate: Restricted Units	5.0%			
	Vacancy Rate: Unrestricted Units	5.0%			
	Vacancy Rate: Tenant Assistance Payments	5.0%			
	Vacancy Rate: Other: (specify)	5.0%			
	Vacancy Rate: Laundry & Vending & Other Income	5.0%			
	Vacancy Rate: Commercial Income		50.0%		
5220/5240	Vacancy Loss(es)	\$152,597	\$0		
Effective Gross Income (EGI)		\$2,899,343	\$0		
Acct. No.	Expenses	Residential	Commercial	Comments	
Administrative Expenses: 6200/6300					
6203	Conventions and Meetings	\$5,114	\$0		
6210	Advertising and Marketing	\$500	\$0		
6250	Other Renting Expenses	\$1,000	\$0		
6310	Office/Administrative Salaries -- from above	\$42,440	\$0		
6311	Office Expenses	\$10,000	\$0		
6312	Office or Model Apartment Rent	\$0	\$0		
6320	Management Fee	\$73,800	\$0		
6330	Site/Resident Manager(s) Salaries -- from above	\$62,000	\$0		
6331	Administrative Free Rent Unit -- from above	\$0	\$0		
6340	Legal Expense -- Project	\$4,000	\$0		
6350	Audit Expense	\$10,500	\$0		
6351	Bookkeeping Fees/Accounting Services	\$14,022	\$0		
6390	Miscellaneous Administrative Expenses	\$120,000	\$0		
6263T	Total Administrative Expenses	\$343,376	\$0		

Required QIP Annual Income and Expenses

Acct. No.	Expenses	Residential	Commercial	Comments
Utilities Expenses: 6400				
6450	Electricity	\$47,232	\$0	
6451	Water	\$73,800	\$0	
6452	Gas	\$0	\$0	
6453	Sewer	\$103,320	\$0	
	Other Utilities: (specify)	\$0	\$0	
6400T	Total Utilities Expenses	\$224,352	\$0	
Operating and Maintenance Expenses: 6500				
				Comments
6510	Payroll -- from above	\$85,780	\$0	
6515	Supplies	\$12,000	\$0	
6520	Contracts	\$65,000	\$0	
6521	Operating & Maintenance Free Rent Unit -- from above	\$0	\$0	
6525	Garbage and Trash Removal	\$66,420	\$0	
6530	Security Contract	\$17,740	\$0	
6531	Security Free Rent Unit -- from above	\$0	\$0	
6546	Heating/Cooling Repairs and Maintenance	\$6,500	\$0	
6548	Snow Removal	\$0	\$0	
6570	Vehicle & Maintenance Equipment Operation/Reports	\$4,000	\$0	
6590	Miscellaneous Operating and Maintenance Expenses	\$1,508	\$0	
6500T	TOTAL Operating & Maintenance Expenses	\$258,948	\$0	
Taxes and Insurance: 6700				
				Comments
6710	Real Estate Taxes	\$3,000	\$0	
6711	Payroll Taxes (Project's Share) -- from above	\$19,022	\$0	
6720	Property and Liability Insurance (Hazard)	\$154,612	\$0	
6729	Other Insurance (e.g. Earthquake)	\$0	\$0	
6721	Fidelity Bond Insurance	\$0	\$0	
6722	Worker's Compensation -- from above	\$17,120	\$0	
6723	Health Insurance/Other Employee Benefits--from above	\$53,618	\$0	
6790	Miscellaneous Taxes, Licenses, Permits & Insurance	\$6,250	\$0	
6700T	Total Taxes and Insurance	\$253,622	\$0	
Supportive Services Costs: 6900				
				Comments
6990	Staff Supervisor(s) Salaries - from above	\$0	\$0	
6990	Services Coordinator Salaries, On-Site - from above	\$60,000	\$0	
6990	Other Supportive Services Staff Salaries - from above	\$0	\$0	
6990	Supportive Services Admin Overhead		\$0	
6990	HOA		\$0	
6990	TDM		\$0	
6900T	Total Supportive Services Costs	\$60,000	\$0	
		Total Operating Expenses	\$1,140,298	\$0
				Comments
Funded Reserves: 7200				
		Residential	Commercial	
7210	Required Replacement Reserve Deposits	\$62,000	\$0	
7220		\$0	\$0	
7230		\$0	\$0	
7240	Other Reserves: (specify)	\$0	\$0	
		Total Reserves	\$62,000	\$0
Ground Lease				
		Residential	Commercial	
	Ground Lease	\$0	\$0	
		Total Ground Lease	\$0	\$0
		Net Operating Income	\$1,697,045	\$0
Financial Expenses: 6800				
				Comments
6820	1st Mortgage Debt Service	\$1,371,136	\$0	
6830	2nd Mortgage Debt Service	\$0	\$0	
6840	3rd Mortgage Debt Service	\$0	\$0	
6890	HCD must pay debt service	\$82,364	\$0	
6890	Annual Issuer Fees	\$26,989	\$0	
6890			\$0	
6890			\$0	
6800T	Total Financial Expenses	\$1,480,489	\$0	
		Cash Flow	\$216,556	\$0
7190	Asset Management/Similar Fees	\$0	\$0	
Total Operating Expenses Per Unit		Per Year	Per Month	
Without any Adjustments		\$8,909	\$742	
With the Value of Rent-Free Units Included		\$8,909	\$742	
Without RE Taxes, Social Services Coordinator or Social Services/Social Programs and With the Value of Rent Fee Units Included		\$8,416	\$701	

Required QIP Cash Flow Analysis

Is Income from Restricted Units based on Restricted or Proposed Rents?		Restricted Rents														
Income From Housing Units	Inflation	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
Restricted Unit Rents	2.5%	3,026,940	3,102,614	3,180,179	3,259,683	3,341,175	3,424,705	3,510,322	3,598,080	3,688,032	3,780,233	3,874,739	3,971,608	4,070,898	4,172,670	4,276,987
Unrestricted Units	2.5%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Tenant Assistance Payments																
Subsidy Program Name	2.5%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Subsidy Program Name	2.5%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Operating Subsidies	2.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other: (specify)	2.5%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Gross Potential Income - Housing		3,026,940	3,102,614	3,180,179	3,259,683	3,341,175	3,424,705	3,510,322	3,598,080	3,688,032	3,780,233	3,874,739	3,971,608	4,070,898	4,172,670	4,276,987
Other Income																
Laundry & Vending	2.5%	25,000	25,625	26,266	26,922	27,595	28,285	28,992	29,717	30,460	31,222	32,002	32,802	33,622	34,463	35,324
Other Income	2.5%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Commercial Income	2.5%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Gross Potential Income - Other		25,000	25,625	26,266	26,922	27,595	28,285	28,992	29,717	30,460	31,222	32,002	32,802	33,622	34,463	35,324
Gross Potential Income - Total		3,051,940	3,128,239	3,206,444	3,286,606	3,368,771	3,452,990	3,539,315	3,627,798	3,718,493	3,811,455	3,906,741	4,004,410	4,104,520	4,207,133	4,312,311
Vacancy Assumptions																
Restricted Units	5.0%	151,347	155,131	159,009	162,984	167,059	171,235	175,516	179,904	184,402	189,012	193,737	198,580	203,545	208,634	213,849
Unrestricted Units	5.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Tenant Assistance Payments	5.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other: (specify)	5.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Laundry/Vending/Other Income	5.0%	1,250	1,281	1,313	1,346	1,380	1,414	1,450	1,486	1,523	1,561	1,600	1,640	1,681	1,723	1,766
Commercial Income	50.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Vacancy Loss		152,597	156,412	160,322	164,330	168,439	172,649	176,966	181,390	185,925	190,573	195,337	200,220	205,226	210,357	215,616
Effective Gross Income		2,899,343	2,971,827	3,046,122	3,122,275	3,200,332	3,280,340	3,362,349	3,446,408	3,532,568	3,620,882	3,711,404	3,804,189	3,899,294	3,996,776	4,096,696
Operating Expenses & Reserve Deposits																
Residential Exp. (w/o Real Estate Taxes & Sup. Services)	3.5%	1,077,298	1,115,003	1,154,029	1,194,420	1,236,224	1,279,492	1,324,274	1,370,624	1,418,596	1,468,247	1,519,635	1,572,822	1,627,871	1,684,847	1,743,816
Real Estate Taxes	2.0%	3,000	3,060	3,121	3,184	3,247	3,312	3,378	3,446	3,515	3,585	3,657	3,730	3,805	3,881	3,958
Supportive Services Costs	2.5%	60,000	61,500	63,038	64,613	66,229	67,884	69,582	71,321	73,104	74,932	76,805	78,725	80,693	82,711	84,778
Replacement Reserve	0.0%	62,000	62,000	62,000	62,000	62,000	62,000	62,000	62,000	62,000	62,000	62,000	62,000	62,000	62,000	62,000
Other Reserves	0.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Ground Lease	2.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Commercial Expenses	3.5%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Expenses & Reserves		1,202,298	1,241,563	1,282,187	1,324,217	1,367,700	1,412,689	1,459,234	1,507,391	1,557,215	1,608,764	1,662,097	1,717,278	1,774,369	1,833,438	1,894,553
Net Operating Income		1,697,045	1,730,263	1,763,935	1,798,059	1,832,632	1,867,652	1,903,115	1,939,017	1,975,353	2,012,118	2,049,307	2,086,911	2,124,925	2,163,338	2,202,143
Debt Service																
1st Mortgage		1,371,136	1,371,136	1,371,136	1,371,136	1,371,136	1,371,136	1,371,136	1,371,136	1,371,136	1,371,136	1,371,136	1,371,136	1,371,136	1,371,136	1,371,136
Bridge Loan (repaid from Investor equity)		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2nd Mortgage		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3rd Mortgage Debt Service		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Misc. Financial Expenses: (specify)		109,353	109,353	109,353	109,353	109,353	109,353	109,353	109,353	109,353	109,353	109,353	109,353	109,353	109,353	109,353
Total Required Debt Service		1,480,489	1,480,489	1,480,489	1,480,489	1,480,489	1,480,489	1,480,489	1,480,489	1,480,489	1,480,489	1,480,489	1,480,489	1,480,489	1,480,489	1,480,489
Cash Flow after all debt service		216,556	249,774	283,446	317,570	352,143	387,163	422,626	458,528	494,864	531,629	568,818	606,422	644,436	682,849	721,654
Debt Service Coverage Ratio (DSCR)		1.15	1.17	1.19	1.21	1.24	1.26	1.29	1.31	1.33	1.36	1.38	1.41	1.44	1.46	1.49

Balboa Reservoir QIA Verification of Environmental Review & Land Use Entitlements										6/21/21
File Name	Auth to Use Grant Funds	For NEPA only, provide a copy of the HUD 7015.16 "Authority To Use Grant Funds" or clarify the current status of the issuance of the HUD form.						Uploaded to HCD?	Yes	
File Name	Environmental	Provide a copy of all environmental clearances or Notice of Exemption.						Uploaded to HCD?	Yes	
<p><i>TO THE APPLICANT: Submit this form to the agency or department of local government responsible for administration of the items listed. This form may be submitted to more than one agency or department, if necessary. QIP Applicants need only submit one completed form per Locality. If the NEPA Responsible Entity is not a local government, submit a copy of this form to the appropriate NEPA Responsible Entity. If an item is not required, include the reason why in the box provided.</i></p>										
Applicant										
Entity Name					City and County of San Francisco		Applicant Type		City and County that have jurisdiction over the QIA	
Address					1 S Van Ness Avenue		City	San Francisco	State	CA
					Zip	94103				
Required QIP	Project Name	Brief Description	Address	City	Zip	County	Census Tracts	APNs		
	Balboa Reservoir Building E	Balboa Reservoir Building E is a proposed new construction 128-unit Low Income Housing Tax Credit (LIHTC) development located at 11 Frida Kahlo Way, in San Francisco, California. The property will offer 127 affordable rental units restricted to households earning up to 30, 50 and 60 percent of the area median income (AMI). The remaining two-bedroom unit will be a non-rental manager's unit. The Project will exceed City Green Standards, with solar, zero parking, and green building best practices. At Building E, all of the individual units and	11 Frida Kahlo Way	San Francisco	94112	San Francisco	6075031000	Block 3180/Lot 190		
<p>TO THE LOCAL JURISDICTION OR NEPA RESPONSIBLE ENTITY: The Applicant named above will submit an application to the State of California, Department of Housing and Community Development, requesting funding for the project named above under the Infill Infrastructure Grant Program (IIG). Projects will be evaluated based upon readiness. Please answer the following questions:</p>										
Environmental Review										
Is this QIP approved "by right"?										
This form must be completed in its entirety regardless of the answer to the preceding question.										
All Environmental Clearances (CEQA/NEPA) necessary to begin construction are:		Not Required for this Project	Has a Negative Declaration been issued?	Final Date of Public Comment Period	Date(s) EIR Certified / Notice of Determination filed	Date Appeal Period Ends	Have any appeals been filed?			
CEQA										
NEPA*										
In the box below, explain why any items are not required and include documentation, if applicable:										
Signature Block for Environmental Review										
I certify that the information on this form is true and correct to the best of my knowledge.										
Date:		Signature of party completing form:								
Printed name of party completing form:										
Title of party completing form:		Agency and/or Dept. name:								
Agency/Dept. Address		City				State		Zip		
Land Use Entitlements (indicate below the status of the following local approvals)										
All necessary and discretionary public land use approvals except building permits and other ministerial approvals are:			Not Required for this Project	QIP is consistent with local planning documents & zoning ordinances	An Application has been submitted, accepted and deemed complete for processing.			Date Approved		
General Plan Amendment:										
Site Plan Review:										
Zoning Approval:										
Conditional Use Permits:										
Density Bonus:										
Other Variances:										
Other Variances:										
Other Variances:										
Other Variances:										
Other Variances:										
In the box below, explain why any items are not required and include documentation, if applicable:										
Signature Block for Land Use Entitlements										
I certify that the information on this form is true and correct to the best of my knowledge.										
Date:		Signature of party completing form:								
Printed name of party completing form:										
Title of party completing form:		Agency and/or Dept. name:								
Agency/Dept. Address		City				State		Zip		
HCD requires an original, fully completed form with signatures.										

QIA Scoring										6/21/21
250 Points Max (points in blue shaded cells)										Total QIA Self Score 240.00
Area Readiness §310(a) - 100 Points Max										
File Name	E&L Use	Provide signed copies of Env & Land Use Verification worksheet. Identify name of Locality at beginning of document.						Uploaded to HCD?	Yes	
(1) Multiple QIPs - 10 points max (if the number of QIPs within the QIA is more than one and land use entitlements required for construction has been secured and submitted to HCD by the application due date, select "Yes" below)								Number of QIPs within the QIA?	Two QIPs	
(B) The QIA will have two QIPs that provide a minimum of 150 new or rehabilitated housing units and can secure all land use entitlements required for construction within a reasonable period of time following the submittal of the Program application or that all applications required for construction have been submitted under a Nondiscretionary Local Approval Process. - 5 points									10	
Provide a listing and status of all discretionary local land use approvals, excluding design review, required to complete QIP that have been granted, submitted or to be applied for to the appropriate local agencies, or consistent with local planning documents. This information must match the information provided on the Verification of the Status of Environmental Review and Land Use Entitlements form.										
Required QIP #1 - Agency / Issuer		Land Use Approval Date	Approval Type	Type and Comments						
				Site Plan Review						
				Conditional Use Permits						
				Zoning Approval						
San Francisco Planning Commission		5/28/20	(A) Approved	Certification of the Final EIR						
Board of Supervisors - City of San Francisco		8/18/20	(A) Approved	Approved a General Plan Amendment, Planning Code and Zoning Ma						
				Other (specify)						
				Other (specify)						
				Other (specify)						
				Other (specify)						
QIP #2 - Agency / Issuer		Land Use Approval Date	Approval Type	Type and Comments						
				Site Plan Review						
				Conditional Use Permits						
				Zoning Approval						
San Francisco Planning Commission		5/28/20	(A) Approved	Certification of the Final EIR						
Board of Supervisors - City of San Francisco		8/18/20	(A) Approved	Approved a General Plan Amendment, Planning Code and Zoning Ma						
				Other (specify)						
				Other (specify)						
				Other (specify)						
				Other (specify)						
(2) Environmental review status - 25 points max (if environmental reviews and necessary entitlements have been secured and submitted to HCD by the application due date, select "Yes" below)										
(A) For the QIA, we have completion and approval or adoption of all necessary environmental clearances including those required under the CEQA and NEPA, if applicable and all applicable time periods for filing appeals or lawsuits have lapsed. If no, answer (B). - 25 points								Yes	25	
(B) For the QIA, we have a draft of a program, master or tiered environmental impact report that has been certified by the appropriate agency and the developments included in the application will constitute subsequent projects subject to environmental review as such pursuant to CEQA Guidelines, Chapter 3, Title 14, CCR, commencing with §15000? If no, answer (C). - 15 points										
(C) For the QIA, we have a draft of a program, master or tiered environmental impact report has been completed and filed with the appropriate agency and the developments included in the application will constitute subsequent projects subject to environmental review as such pursuant to CEQA Guidelines, Chapter 3, Title 14, CCR, commencing with §15000? If no, answer (D). - 10 points										
(D) For the QIA, not less than 50% of the land area is on sites that have been subject to a Phase 1 Site Assessment within one year prior to the application due date. - 5 points										
NEPA:	Federal funding proposed that will trigger NEPA? Describe circumstances below:			No	If Yes, enter date of "Authority to Use Grant Funds":			N/A		
CEQA:	Project approved "by-right"?	No	Is Project Categorically Exempt?	No	Negative Declaration Date:	N/A	Final EIR Date:	5/28/20	Describe special circumstances below:	
On May 28, 2020, the Planning Commission of San Francisco certified the Final Subsequent EIR (Motion No. 20730); adopted CEQA Findings, a Statement of Overriding Considerations, and the Mitigation, Monitoring and Reporting Program (Motion No. 20731); recommended approval of General Plan Amendments (Resolution No. 20732); recommended approval of Planning Code and Zoning Map Amendments (Resolution No. 20733); approved Design Standards and Guidelines (Motion No. 20734); and recommended approval of a Development Agreement between the City and Reservoir Community										
(3) Land use entitlement status - 25 points max (if necessary entitlements from the local jurisdiction have been secured and submitted to HCD by the application due date, select "Yes" below)										
(A) All necessary local land use approvals for developments within the QIA, have been granted, as determined by a local land use authority (e.g., planning or community development director or zoning administrator)? identify in table below - 25 points.								Yes	25	
(B) The developments within the QIA are consistent with all relevant local planning documents and zoning ordinances and applications for all necessary discretionary local land use approvals have been submitted and deemed complete by the appropriate local agencies? identify in table below - 15 points.										
(C) The QIP within the QIA is eligible to receive all necessary local land use approvals per a Nondiscretionary Local Approval Process? identify in table below - 10 points										
Provide a listing and status of all discretionary local land use approvals, excluding design review, required to complete QIP that have been granted, submitted or to be applied for to the appropriate local agencies, or consistent with local planning documents. This information must match the information provided on the Verification of the Status of Environmental Review and Land Use Entitlements form.										
Agency / Issuer		Land Use Approval Date	Approval Type	Type and Comments						
				Site Plan Review						
				Conditional Use Permits						
				Zoning Approval						
San Francisco Planning Commission		5/28/20	(A) Approved	Certification of Final EIR						
Board of Supervisors - City of San Francisco		8/18/20	(A) Approved	Approved a General Plan Amendment, Planning Code and Zoning Ma						
				Other (specify)						
IIG 2021 NOEA				Other (specify)						

QIA Scoring										6/21/21	
										Other (specify)	
										Other (specify)	
(4) Leveraged funding commitments - 20 points max											
All funding sources on the Dev Sources worksheet rows 59 to 74 must include: "Rental" or "Homeowner" and "CIP" or "QIP #1".											
Rental funding commitments as a % of total development costs less private mortgage financing and deferred costs:								Permanent:	80.40%	Points:	10
HO funding commitments as a % of total development costs less private mortgage financing & deferred costs:								Permanent:	0.00%	Points:	0
File Name		Perm EFC #1, #2, etc		Proof(s) of permanent financing, see §302(m)				Uploaded to HCD?		Yes	
(5) Local support - 12 points max											
(A) Obtaining a funding commitment(s) from a local public agency(ies) for the QIP or CIP - 12 points (All funding sources on Dev Sources worksheet rows 6 to 24 must include "Yes" or "No" regarding whether it is Local Support)										12	
Total Local Public Agencies Funding Commitment Amount:				\$22,344,128	CIP Grant Amount		\$20,095,616	Commitments as % of Grant:		111.19%	
File Name		Local EFC #1, #2, etc		Proof(s) of local support, see §309(a)(4)(B)				Uploaded to HCD?		Yes	
(6)(A) Prohousing Policies - 8 points max											
(i) Projects located in jurisdictions that have implemented programs over the last five years, which are currently in effect, that finance infrastructure with accompanying increased housing capacity in areas of high segregation and poverty or low resource opportunity area (see TCAC/HCD Opportunity Area Maps) or disadvantaged community pursuant to Senate Bill 535 and Assembly Bill 1550 or provide local financial incentives for housing, including, but not limited to, a local housing trust fund or fee waivers. - 4 points										0	
(ii) Projects located in jurisdictions that have adopted a Nondiscretionary Local Approval Process for residential & mixed-use development in all zones permitting multifamily housing, established a Workforce Housing Opportunity Zone, as defined in Gov. Code §65620, or a housing sustainability district as defined in Gov. Code §66200. - 4 points										Yes 4	
(iii) Projects located in jurisdictions that zone more sites for residential development or zoning sites at higher densities than is required to accommodate 150 percent of the minimum regional housing need allocation for the Lower Income allocation in the current housing element cycle. - 4 points										0	
(iv) Projects in jurisdictions that have adopted accessory dwelling unit ordinances or other mechanisms that reduce barriers for property owners to create accessory dwelling units beyond the requirements outlined in Gov. Code §65852.2 as follows: - 4 points 1. Parking reductions to 0.75 or fewer spaces per accessory dwelling unit in areas not already exempt from parking pursuant to Gov. Code §65852.2; 2. Processing or impact fee waivers or reductions of 50% or more; 3. Ministerial approval in fewer than 45 days; 4. Reduction or modifications of development standards for side yard setbacks of five feet or less; 5. Reduction or modifications of development standards to two story heights; 6. Reduction or modifications of development standards to allow 60% or more lot coverage; 7. No minimum lot size requirement; 8. Provisions for affordability; or 9. Offering support programs such as a user-friendly website										Yes 4	
(v) Projects located in jurisdictions that only use objective design standards for multifamily residential development or adopt fee transparency measures, inc. publicly available fee calculators. - 4 points										0	
Select Strategy Type (from above)	Strategy Description			Enter name of source document and the hyperlink to where the document can be accessed.		Estimated Outcomes - Describe numerically in terms of increase in supply (number of units), timing (reduced number of days), development costs (reduced costs per unit), entitlement streamlining (reduced number of approvals), or funding (dollar value of incentives).					
(ii) Non-discretionary Approval Processes	Purpose: Ordinance amending the Planning Code to create the 100 Percent Affordable Housing and Educator Housing Streamlining Program; to allow affordable housing and affordable teacher housing in Public zoning districts; and to provide timelines for the review and approval of affordable housing and			100% Affordable Housing and Educator Housing Streamlining Program: https://sfgov.legistar.com/View.ashx?M=F&ID=7977063&GUID=A5C7DE0C-E4A6-4C07-90FE-53F6CE0DE6E0		<ul style="list-style-type: none"> Up to 3,000 new units allowed in residential zoning districts and in public zoning districts, except on property used for parks Reducing the total number of days from up to 365 to no more than 180 days for approval from the Planning Department, due to the Planning Department's authority to administratively approve 100% Affordable and Educator Housing projects, without review by the Planning Commission. 					
(iv) Accessory Dwelling Units (ADU)	Strategy: Planning, Administrative Codes - Construction of Accessory Dwelling Units Purpose: Ordinance amending the Planning Code to allow the construction of Accessory 4 Dwelling Units (ADUs, also known as Secondary or In-Law Units) on all lots in the City 5 in areas that allow residential use; amending the Administrative Code			https://sfplanning.org/accessory-dwelling-units#about and https://sfdbi.org/adu		<ul style="list-style-type: none"> Simplify the permit process to expedite the backlog of 900 applications. Legitimize over 340 unwarranted units to allow for rent control protections. <p>As of mid-2019, the City of San Francisco received over 1,700 applications for Accessory Dwelling Units over the course of 5 years. Of these applications, a total of 865 Accessory Dwelling Units were approved to be built. Along with fee waivers covering approximately 9% of total ADU development costs, and additional assistance, the City of San Francisco can review more permits for</p>					
Affordability §310(b) - 60 Points Max											
Points based on % of QIA units restricted to occupancy by various income groups. (see Max Funds and Unit Mix worksheet)								§310(b)(1) points=	36.43	§310(b)(2) points=	60.00
											60.00
Density §310(c) - 40 Points Max											
Points based on extent to which the Net Density of QIA, adjusted by unit size, exceeds the required Net Density §303(c)(4). see Eligibility and Threshold worksheet AJ114 & U15						Minimum Net Density =	30	% QIA meets or exceeds required Net Density:	599.86%	40	
Access to Transit §310(d) - 20 Points Max											
Points for proximity of QIP to a Transit Station or Major Transit Stop. Distance must be evidenced by a scaled map. Walkable Route is defined in §302(qq).											
Type	Major Transit Stop	Transit Name	SFMTA Muni K	Contact	Kristin Michael, SFMTA Kristin.Michael@sfmta.co	Phone	415-701-2311	Planned Station Service Date	N/A		
(1) Is QIP within one-quarter mile of a Transit Station or Major Transit Stop measured by a Walkable Route from nearest boundary of QIP to the outer boundary of the site of the Transit Station or Major Transit Stop? - 20 points										Yes	
(2) Is QIP within one half mile of a Transit Station or a Major Transit Stop, measured by a Walkable Route from the nearest boundary of the QIP to the outer boundary of the site of the Transit Station or Major Transit Stop and located in an area of high segregation and poverty or low resource opportunity area (see TCAC/HCD Opportunity Area Maps) or disadvantaged community pursuant to Senate Bill 535 and Assembly Bill 1550? - 15 points										20	
(3) Is QIP within one half mile of a Transit Station or Major Transit Stop measured by a Walkable Route from the nearest boundary of QIP to the outer boundary of the site of the Transit Station or Major Transit Stop? - 10 points											
File Name		Transit Access		Provide scaled map showing Transit Stations or Major Transit Stops and Walkable Routes.				Uploaded to HCD?		Yes	

QIA Scoring										6/21/21
File Name	TCAC Opportunity Map	Provide 'TCAC/HCD Opportunity Area Map' showing QIP is located in an area of high segregation and poverty or low resource opportunity area.						Uploaded to HCD?	Yes	
File Name	Transit Schedule	Transit service schedule publicly posted between January 2020 and date of application.						Uploaded to HCD?	Yes	
Access to Opportunity and Proximity to Amenities §310(e) - 20 Points Max										
Points based on the proximity or accessibility of QIP to the following existing amenities or amenities that will be in service when the construction of the QIP is completed. Distance to amenities shall be evidenced by a certified date stamped scaled map.								Rural Area Project?	No	20
(1) The QIP is located in a High or Highest Resource Area as specified on a TCAC/HCD Opportunity Area Map? - 20 points								Yes	20	
(2) The QIP is within what distance from a Park §302(y) (not including school grounds unless there is a bona fide, formal joint use agreement between the jurisdiction responsible for the parks/recreational facilities and the school district providing availability to the general public of the school grounds and/or facilities)? - 3 or 5 points									0	
Entity Name					Responsible jurisdiction					
Site Address					City	State		Zip		
Contact					Title	Phone	Date In Service			
File Name	Park Access	Provide scaled map showing distance to Park.						Uploaded to HCD?		
(3) The QIP is within what distance from a locally recognized Employment Center §302(l) with at least 50 full time employees? - 3 or 5 points.									0	
Entity Name					Responsible jurisdiction					
Site Address					City	State		Zip		
Contact					Title	Phone	Date In Service			
File Name	Employment Access	Provide scaled map showing distance to Employment Center.						Uploaded to HCD?		
Entity Name					Responsible jurisdiction					
Site Address					City	State		Zip		
Contact					Title	Phone	Date In Service			
(4) The QIP is within what distance from a locally recognized Retail Center §302(dd) with at least 50 full-time employees - 3 or 5 points.									0	
File Name	Retail Access	Provide scaled map certified showing distances to Retail Center.						Uploaded to HCD?		
(5) The QIP is within what distance from a public school or community college that residents of the QIP may attend - 3 or 5 points.									0	
Entity name					Responsible jurisdiction					
Site address					City	State		Zip		
Contact					Title	Phone	Date in service			
File Name	Education Access	Provide scaled map showing distances to public school/college.						Uploaded to HCD?		
(6) The QIP is within what distance from a social service facility that operates to serve residents of the QIP? - 3 or 5 points									0	
Entity name					Responsible jurisdiction					
Site address					City	State		Zip		
Contact					Title	Phone	Date in service			
File Name	Social Service Access	Provide scaled map showing distances to social service facility.						Uploaded to HCD?		
Consistency with Regional Plans §310(f) - 10 Points Max										
Points awarded for each of the following									10	
(A)	Does QIA support the implementation of a sustainable communities strategy or alternative planning strategy that has been determined by the California Air Resources Board to achieve the region's greenhouse gas emissions target. Consistency with such plans must be demonstrated by a letter or resolution executed by an officer, or an equivalent representative from the metropolitan planning organization, regional transportation agency, planning, or local transportation commission - 5 points						Yes	5		
(B)	If a sustainable communities strategy is not required for a region by law, and if the QIA supports a regional plan that includes policies and programs to reduce greenhouse gas emissions. Evidence of consistency with such plans must be demonstrated by a letter or resolution executed by an officer of, or an equivalent representative from the metropolitan planning organization or regional transportation planning agency or local transportation commission. - 5 points							0		
(C)	Not less than 50% of land area is within a Transit Priority Area evidenced by a letter or resolution executed by an officer of, or an equivalent representative from the metropolitan planning organization, regional transportation planning agency, or local transportation commission - 5 points						Yes	5		
File Name	QIA Consistency	Letters or resolutions from the local council of government, metropolitan planning organization or regional transportation planning agency confirming points above.						Uploaded to HCD?	Yes	
Tie Breaker §307(b)(3); NOFA										
In the event two or more applications have the same rating and ranking scores, HCD will apply tie breaking criteria outlined in the NOFA.								Application due date	7/12/21	
(1) 10 bonus points to the QIA having the lowest ratio between the requested grant amount to the total allowable maximum grant amount per the NOFA.								Ratio=	100.00%	
(2) If tie still exists, 3 points to the QIA for each prior awarded QIP developed by the Applicant that has received a Certificate of Occupancy by the application deadline.										
Development Name:					IIG prior NOFA Date	Cert. of Occup Date:			0	
Development Name:					IIG prior NOFA Date	Cert. of Occup Date:			0	
Development Name:					IIG prior NOFA Date	Cert. of Occup Date:			0	
Development Name:					IIG prior NOFA Date	Cert. of Occup Date:			0	
Development Name:					IIG prior NOFA Date	Cert. of Occup Date:			0	
Development Name:					IIG prior NOFA Date	Cert. of Occup Date:			0	

Certification & Legal Disclosure

6/21/21

On behalf of the entity identified in the signature block below, I certify that:

1. The information, statements and attachments included in this application are, to the best of my knowledge and belief, true and correct.
2. I possess the legal authority to submit this application on behalf of the entity identified in the signature block.
3. The following is a complete disclosure of all identities of interest - of all persons or entities, including affiliates, that will provide goods or services to the Project either (a) in one or more capacity or (b) that qualify as a "Related Party" to any person or entity that will provide goods or services to the Project. "Related Party" is defined in Section 10302 of the California Code of Regulations (CTCAC Regulations):

4. As of the date of application, the Project, or the real property on which the Project is proposed (Property) is not party to or the subject of any claim or action at the State or Federal appellate level.

5. I have disclosed and described below any claim or action undertaken which affects or potentially affects the feasibility of the Project.

In addition, I acknowledge that all information in this application and attachments is public, and may be disclosed by the State.

Printed Name	Title of Signatory	Signature	Date

Legal Disclosure

For purposes of the following questions, and with the exceptions noted below, the term "applicant" shall include the applicant and joint applicant, and any subsidiary of the applicant or joint applicant if the subsidiary is involved in (for example, as a guarantor) or will be benefited by the application or the project.

In addition to each of these entities themselves, the term "applicant" shall also include the direct and indirect holders of more than ten percent (10%) of the ownership interests in the entity, as well as the officers, directors, principals and senior executives of the entity if the entity is a corporation, the general and limited partners of the entity if the entity is a partnership, and the members or managers of the entity if the entity is a limited liability company. For projects using tax-exempt bonds, it shall also include the individual who will be executing the bond purchase agreement.

The following questions must be responded to for each entity and person qualifying as an "applicant," or "joint applicant" as defined above.

Explain all positive responses on a separate sheet and include with this questionnaire in the application.

Exceptions:

Public entity applicants without an ownership interest in the proposed project, including but not limited to cities, counties, and joint powers authorities with 100 or more members, are not required to respond to this questionnaire.

Members of the boards of directors of non-profit corporations, including officers of the boards, are also not required to respond. However, chief executive officers (Executive Directors, Chief Executive Officers, Presidents or their equivalent) must respond, as must chief financial officers (Treasurers, Chief Financial Officers, or their equivalent).

Civil Matters

1. Has the applicant filed a bankruptcy or receivership case or had a bankruptcy or receivership action commenced against it, defaulted on a loan or been foreclosed against in *past ten years*?
2. Is the applicant currently a party to, or been notified that it may become a party to, any civil litigation that may materially and adversely affect (a) the financial condition of the applicant's business, or (b) the project that is the subject of the application?
3. Have there been any administrative or civil settlements, decisions, or judgments against the applicant within the past ten years that materially and adversely affected (a) the financial condition of the applicant's business, or (b) the project that is the subject of the application?
4. Is the applicant currently subject to, or been notified that it may become subject to, any civil or administrative proceeding, examination, or investigation by a local, state or federal licensing or accreditation agency, a local, state or federal taxing authority, or a local, state or federal regulatory or enforcement agency?
5. In the past ten years, has the applicant been subject to any civil or administrative proceeding, examination, or investigation by a local, state or federal licensing or accreditation agency, a local, state or federal taxing authority, or a local, state or federal regulatory or enforcement agency that resulted in a settlement, decision, or judgment?

Criminal Matters

6. Is the applicant currently a party to, or the subject of, or been notified that it may become a party to or the subject of, any criminal litigation, proceeding, charge, complaint, examination or investigation, of any kind, involving, or that could result in, felony charges against the applicant?
7. Is the applicant currently a party to, or the subject of, or been notified that it may become a party to or the subject of, any criminal litigation, proceeding, charge, complaint, examination or investigation, of any kind, involving, or that could result in, misdemeanor charges against the applicant for matters relating to the conduct of the applicant's business?
8. Is the applicant currently a party to, or the subject of, or been notified that it may become a party to or the subject of, any criminal litigation, proceeding, charge, complaint, examination or investigation, of any kind, involving, or that could result in, criminal charges (whether felony or misdemeanor) against the applicant for any financial or fraud related crime?
9. Is the applicant currently a party to, or the subject of, or been notified that it may become a party to or the subject of, any criminal litigation, proceeding, charge, complaint, examination or investigation, of any kind, that could materially affect the financial condition of the applicant's business?
10. Within the past ten years, has the applicant been convicted of any felony?
11. Within the past ten years, has the applicant been convicted of any misdemeanor related to the conduct of the applicant's business?
12. Within the past ten years, has the applicant been convicted of any misdemeanor for any financial or fraud related crime?

Please provide a letter of explanation if you responded "Yes" to any of the questions above.

File Name: Cert & Legal Explanation	Letter of explanation for any "Yes" answers or red shaded items above.	Uploaded to HCD?
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Printed Name	Title of Signatory	Signature	Date

Application Development Team (ADT) Support Form

Please complete the "yellow" cells in the form below and email a copy to: AppSupport@hcd.ca.gov. A member of the Application Development Team will respond to your request within ASAP.

Full Name:		Date Requested:		Application Version Date:	
Organization:		Email:		Contact Phone:	

Justification:

Issue #	Program Name &	Tab	Section	Cell#	Update/Comment	Urgency	ADT Status	Status Date
1	IIG							
2	IIG							
3	IIG							
4	IIG							
5	IIG							
6	IIG							
7	IIG							
8	IIG							
9	IIG							
10	IIG							
11	IIG							
12	IIG							
13	IIG							
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21	IIG							
22	IIG							
23	IIG							
24	IIG							
25	IIG							

Balboa Reservoir QIA IIG 2021 Upload Document Checklist				6/21/21
File Name:	Site Plan	§308(a)(1) Provide documentation of compliance with §302(aa) certified by a California State-licensed professional such as an engineer, surveyor, or landscape architect.	File uploaded?	Yes
File Name:	App1 Cert of BIPOC	See Applicant Documents worksheet.	File uploaded?	N/A
File Name:	App2 Cert of BIPOC	See Applicant Documents worksheet.	File uploaded?	0
File Name:	App1 Cert & Legal	Certification & Legal Disclosure	File uploaded?	Yes
File Name:	App2 Cert & Legal	Certification & Legal Disclosure	File uploaded?	0
File Name:	App1 Reso	Resolution	File uploaded?	Yes
File Name:	App2 Reso	Resolution	File uploaded?	0
File Name:	App1 OrgChart	Organizational Chart	File uploaded?	Yes
File Name:	App2 OrgChart	Organizational Chart	File uploaded?	0
File Name:	App1 Org1, App1 Org2, etc.	Organizational Documents	File uploaded?	N/A
File Name:	App2 Org1, App2 Org2, etc.	Organizational Documents	File uploaded?	0
File Name:	App1 Signature	Signature Block (Upload in Microsoft Word Document)	File uploaded?	Yes
File Name:	App2 Signature	Signature Block (Upload in Microsoft Word Document)	File uploaded?	0
File Name:	App1 Payee Data or TIN	Payee Data Record STD-204 or Taxpayer Identification Number (TIN)	File uploaded?	N/A
File Name:	App2 Payee Data or TIN	Payee Data Record STD-204 or Taxpayer Identification Number (TIN)	File uploaded?	0
File Name:	Utility Allowance	Local housing authority document showing current utility allowance chart, with relevant components circled.	File uploaded?	Yes
File Name:	Rural Status	TCAC Method for determining Rural status.	File uploaded?	N/A
File Name:	CIP Integral to QIP	Applicant narrative and documentation evidencing the Locality requiring the CIP.	File uploaded?	Yes
File Name:	Urban Area	Provide documentation of location in an Urbanized Area.	File uploaded?	Yes
File Name:	Replacement Housing Plan	Provide the Replacement Housing Plan if there will be replacement units	File uploaded?	N/A
File Name:	Development Agreement	Agreement executed prior to August 24, 2007 that contains affordability covenants.	File uploaded?	N/A
File Name:	Relevant Development Plan	Provide, label and attach a copy of the relevant plan showing area designation.	File uploaded?	Yes
File Name:	Net Density Verification	Provide a minimum density ordinance, recorded binding covenant or date stamped map and letter certified by a California State-licensed professional such as an engineer, surveyor or landscape architect confirming the Net Density.	File uploaded?	Yes
File Name:	Construction exception	If applicable, label and attach agreement requiring AUs be built as a local approval condition.	File uploaded?	N/A
File Name:	CIP Site Control	Appropriate documentation to demonstrate the form of Site Control indicated above.	Files uploaded?	Yes
File Name:	QIP Relocation Plan	Applicants must provide a Relocation Plan or documentation supporting no relocation.	File uploaded?	Yes
File Name:	Fair Housing Self-Certification	Must provide a self-certification document that is acceptable to HCD certifying that the Occupancy restrictions will be carried out in a manner that is consistent with federal fair housing laws.	File uploaded?	Yes
File Name:	Market Study	Applicants must provide a completed market study prepared within one year of the application due date.	File uploaded?	Yes
File Name:	Tax Credit Reservation	If Project has already received a tax credit reservation, attach documentation.	File uploaded?	N/A
File Name:	Auth to Use Grant Funds	For NEPA only, provide a copy of the HUD 7015.16 "Authority To Use Grant Funds" or clarify the current status of the issuance of the HUD form.	File uploaded?	Yes
File Name:	Environmental	Provide a copy of all environmental clearances or Notice of Exemption.	File uploaded?	Yes

QIP Scoring Docs

File Name:	E&L Use	Provide signed copies of Verification of Environmental Review & Land Use Entitlements (Env & Land Use Verification worksheet). Identify name of Locality at beginning of document.	File uploaded?	0
File Name:	Perm EFC #1, #2, etc	Proof(s) of permanent financing, see §302(l)	File uploaded?	0
File Name:	Local EFC #1, #2, etc	Proof(s) of local support, see §309(a)(4)(B)	File uploaded?	0
File Name:	Transit Access	Provide scaled map showing Transit Stations or Major Transit Stops and Walkable Routes.	File uploaded?	0
File Name:	TCAC Opportunity Map	Provide 'TCAC/HCD Opportunity Area Map' showing QIP is located in an area of high segregation and poverty or low resource opportunity area.	File uploaded?	0
File Name:	Transit Schedule	Transit service schedule publicly posted between January 2020 and date of application.	File uploaded?	0
File Name:	Park Access	Provide scaled map showing distance to Park.	File uploaded?	0
File Name:	Employment Access	Provide scaled map showing distance to Employment Center.	File uploaded?	0
File Name:	Retail Access	Provide scaled map certified showing distances to Retail Center.	File uploaded?	0
File Name:	Education	Provide scaled map showing distances to public school/college.	File uploaded?	0
File Name:	SPN or SH	Provide scaled map showing distances to social service facility.	File uploaded?	0
File Name:	QIP Consistency	Submit letters or resolutions from the local council of government, metropolitan planning organization or regional transportation planning agency confirming points above.	File uploaded?	0

QIA Scoring Docs

File Name:	E&L Use	Provide signed copies of Verification of Environmental Review & Land Use Entitlements (Env & Land Use Verification worksheet). Identify name of Locality at beginning of document.	File uploaded?	Yes
File Name:	Perm EFC #1, #2, etc	Proof(s) of permanent financing, see §302(l)	File uploaded?	Yes
File Name:	Local EFC #1, #2, etc	Proof(s) of local support, see §310(a)(5)(B)	File uploaded?	Yes
File Name:	Transit Access	Provide scaled map showing Transit Stations or Major Transit Stops and Walkable Routes.	File uploaded?	Yes
File Name:	TCAC Opportunity Map	Provide 'TCAC/HCD Opportunity Area Map' showing QIP is located in an area of high segregation and poverty or low resource opportunity area.	File uploaded?	Yes
File Name:	Transit Schedule	Transit service schedule publicly posted between January 2020 and date of application.	File uploaded?	Yes
File Name:	Park Access	Provide scaled map showing distance to Park.	File uploaded?	0
File Name:	Employment Access	Provide scaled map showing distance to Employment Center.	File uploaded?	0
File Name:	Retail Access	Provide scaled map certified showing distances to Retail Center.	File uploaded?	0
File Name:	Education	Provide scaled map showing distances to public school/college.	File uploaded?	0
File Name:	SPN or SH	Provide scaled map showing distances to social service facility.	File uploaded?	0
File Name:	QIA Consistency	Letters or resolutions from the local council of government, metropolitan planning organization or regional transportation planning agency confirming points above.	File uploaded?	Yes

**DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT
DIVISION OF STATE FINANCIAL ASSISTANCE**

651 Bannon Street, SUITE 400, Sacramento, CA 95811
P. O. Box 952054
Sacramento, CA 94252-2054
(916) 263-2771
www.hcd.ca.gov

****REVISED AWARD LETTER****

November 6, 2024

Daniel Adams, Director
Mayor's Office of Housing and Community Development
City and County of San Francisco
1 South Van Ness Avenue
San Francisco, CA 94103

Dear Daniel Adams:

**RE: Revised Award Announcement – Infill Infrastructure Grant Program
Notice of Funding Availability Fiscal Year 2020/2021, Round 7
City and County of San Francisco – Balboa Reservoir QIA
Contract No. 21-IIG-16857**

The California Department of Housing and Community Development (“**Department**” or “**HCD**”) is pleased to announce City and County of San Francisco have been awarded a Infill Infrastructure Grant Program (IIG), revised award in the amount of **\$20,095,616**—reduced from **\$26,000,000**. This revision resulted from a change in the Qualifying Infill Projects (QIP) for the Qualifying Infill Area (QIA) to remove buildings C, D, and F from the Balboa Reservoir Master Plan. In their place, a new QIP is being added: Balboa Reservoir Building A is being added to the QIA. This letter constitutes notice of the designation of IIG funds for the City and County of San Francisco and fully replaces the letter originally issued on December 2, 2021.

Program	Award Amount	Contract Number
Infill Infrastructure Grant (IIG) Program	\$20,095,616	21-IIG-16857

Infrastructure Grant Program (IIG), Round 7, NOFA award is under a media and public announcement embargo until released by the Office of the Governor or otherwise notified by HCD staff. HCD will provide updates on the timing of the public award announcement and provide a social media toolkit and a quote from the HCD Director for use in local media releases. During the embargo period, this conditional award letter may be submitted in applications to California Tax Credit Allocation Committee (TCAC) and California Debt Limit Allocation Committee (CDLAC).

The Conditional Award is based on and subject to the Applicant Representations and the Terms and Conditions of Conditional Award, both as further specified and described in this notice of the Conditional Award (the “**Conditional Award Commitment**”). This Conditional Award may only be accepted by timely delivery of a fully executed Acceptance of Terms and Conditions of Conditional Award form to the Department (an executed copy of this form is enclosed herein).

I. Applicant Representations – Basis of Conditional Award

In response to the above-mentioned NOFA, the Awardee(s) submitted an application for grant funding of the Project (that application, and all communications and documentation submitted to the Department in support thereof, the “**Application**”).

The Department is making this Conditional Award to the Awardee(s) on the basis of, and in reliance upon, the representations, warranties, projections, and descriptions that the Awardee(s) submitted as part of the Application (the “**Applicant Representations**”).

The Department may rescind this Conditional Award if the Department discovers, at any time prior to disbursement of the Conditional Award, that the Applicant Representations included material misrepresentations or omissions, regardless of whether or not such misrepresentations or omissions were innocent, unintentional, and/or based upon belief.

II. Terms and Conditions of Conditional Award

TIME IS OF THE ESSENCE IN THE SATISFACTION OF THESE TERMS AND CONDITIONS OF CONDITIONAL AWARD.

The Department may rescind this Conditional Award if any of the terms and conditions enumerated in this Section II (the “**Terms and Conditions of Conditional Award**”) are not timely satisfied. The Terms and Conditions of this Conditional Award and their corresponding timelines are described below.

If the Terms and Conditions of this Conditional Award are timely satisfied, the Department will (i) promptly provide a written notification to the Awardee(s) via electronic mail; and (ii) circulate an executed copy of an STD 213, Standard Agreement, for all appropriate signatures and approvals in accordance with the timeline specified in Section III of this Conditional Award Commitment.

All timelines shall be calculated in calendar days. Any deadline falling on a weekend or State of California holiday shall be extended to the next business day.

A. Timely Execution of Acceptance of Terms and Conditions of Conditional Award Form

The Awardee(s) shall execute and deliver a copy of the enclosed Acceptance of Terms and Conditions of Conditional Award to the Department within ten (10) calendar days of the date of this Conditional Award Commitment. The Department will deem this condition to be unsatisfied if it receives an executed Acceptance of Terms and Conditions of Conditional Award that has been substantively modified, altered, or amended in any way. The signed Acceptance of Terms and Conditions of Conditional Award form must be submitted to infill@hcd.ca.gov.

B. Timely Delivery of Authorization and Organizational Documents

If not provided at the time of application, the Awardee(s) shall deliver to the Department, within sixty (60) calendar days of the date upon this Conditional Award Commitment, a legally sufficient set of Authorization and Organizational Documents, as further described and specified below. Specifically, the Awardee(s) shall deliver a duly adopted authorizing resolution, as well as a complete and duly filed or adopted set of organizational documents and all amendments (the “**Authorization and Organizational Documents**”), for each of the following entities as applicable:

- each Awardee entity; the ultimate borrower of the Conditional Award funds (the “**Borrower**”); and,
- each separate legal entity that is part of the Awardee’s or Borrower’s organizational structure.

Each entity’s resolution must constitute, to the Department’s reasonable satisfaction, an unconditional, duly adopted, and legally binding authorization of the entity to accept the total amount of these Conditional Award funds, to fully participate in the relevant Department program, and to be legally bound by the requirements of the Department program. The Department may agree to an extension of fifteen (15) calendar days based on the Awardee’s demonstration of necessity.

Note: Local Public Entities, as defined in the above-mentioned NOFA and/or Final Program Guidelines, are not required to submit a complete and duly filed or adopted set of organizational documents and amendments. Both the Conditional Award and this Conditional Award Commitment are subject to Health and Safety Code section 50406, subdivision (p), as subsequently amended (“**AB 1010**”).

The Department has posted resolution templates on its website as informational guidance. Please note that use of the resolution templates is not compulsory. However, use of the provided templates will assist in the timely review and approval of the Standard Agreement. While entities may choose to use modified language in their resolutions, Sponsors should be aware that this may delay preparation of the Standard Agreement or, if deemed insufficient, may result in the need to submit a revised resolution.

At any point prior to disbursement, the Department may also require the Awardee(s) to resubmit Authorization and Organizational Documents if the original submittals were determined to be inaccurate or incomplete.

III. Delivery of Standard Agreement

In an effort to be responsive to each Awardee's closing needs and to ensure timely commitment of funds, the Department commits to delivering an executed copy of the Standard Agreement relative to this Conditional Award within ninety (90) calendar days of receiving all required documents, including all legally sufficient Authorization and Organizational Documents, in connection with this Project and as applicable.

Your contract is assigned to a Single Point of Contact (SPOC), Sheila Anadon, IIG Representative II, Program Design and Implementation Branch, at (916) 841-8309 or Sheila.Anadon@hcd.ca.gov, which will serve as your contact for any and all inquiries related to the development and execution of the Standard Agreement. If this project has previously received funding from HCD, this new award will be referred to the same contact as your previous award so as to minimize the points of contact from within HCD. You will receive an email from your SPOC within 48 hours of receipt of your signed Acceptance of Terms and Conditions of Conditional Award.

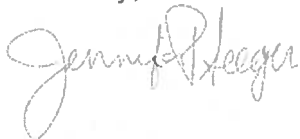
Among the responsibilities of the SPOC will be to maintain contact throughout the next several months as you work to secure all necessary funding sources to begin construction. Your SPOC will be reaching out to you monthly to inquire on status and progress. In the meantime, should you have any changes to the status or make up of your project we ask that you communicate these changes as soon as possible to your assigned SPOC.

IV. Deadline to Secure Permanent Financing

Please note, that the Awardee must secure all permanent financing, including tax credits and bond allocations, within 24 months of the date of the first Department funding award to the Project, consistent with the Department's Disencumbrance Policy ([Administrative Notice Number 2022-02: Disencumbrance Policy](#)). Sponsors must demonstrate that all permanent financing is in place allowing the project to commence construction. Failure to meet this requirement shall result in the withdrawal or recapture of this Conditional Award and any other prior or subsequent funds awarded to the Project.

Congratulations on your successful Application. For further information, please contact your SPOC as outlined in Section III above.

Sincerely,



Jennifer Seeger
Deputy Director
Division of State Financial Assistance

Enclosure: Acceptance of Terms and Conditions of Conditional Award form

California Department of Housing and Community Development

**Infill Infrastructure Grant Program, Round 7
Notice of Funding Availability**

Acceptance of Terms and Conditions of Revised Conditional Award

City and County of San Francisco ("**Awardee**")
Balboa Reservoir QIA ("**Project**")

Infill Infrastructure Grant Program NOFA award totaling \$20,095,616 ("**Conditional Award**"), as detailed below:


Program	Award Amount	Contract Number
Infill Infrastructure Grant (IIG) Program	\$20,095,616	21-IIG-16857

By signing this Acceptance of Terms and Conditions of Conditional Award, the Awardee acknowledges having read and fully understood the terms and conditions of the Conditional Award Commitment, December 2, 2021, and revised November 6, 2024, in connection with the Project.

Infill Infrastructure Grant (IIG), Round 7, NOFA award is under a media and public announcement embargo until released by the Office of the Governor or otherwise notified by HCD staff. HCD will provide updates on the timing of the public award announcement and provide a social media toolkit and a quote from the HCD Director for use in local media releases. During the embargo period, the conditional award letter may be submitted in applications to California Tax Credit Allocation Committee (TCAC) and California Debt Limit Allocation Committee (CDLAC).

In addition, the Awardee(s) acknowledges having read and fully understood all of the Department's requirements relative to the Conditional Award, including the requirements set forth in Administrative Notice Number 2022-22: Disencumbrance Policy, and the Awardee agrees to abide by and comply with those requirements.

In addition, the Awardee(s) must acknowledge that it has reviewed and verified the accuracy of the project report prepared by the Department no later than [Date].



Daniel Adams, Director
City and County of San Francisco

11-13-2024

Date

**** For HCD Use Only ****

- ☐ Authorized Representatives Verified
- ☐ All Parties Signed

Date Received: _____

**DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT
DIVISION OF STATE FINANCIAL ASSISTANCE**

2020 W. El Camino Avenue, Suite 670, 95833
P.O. Box 952054
Sacramento, CA 94252-2054
(916) 263-2771
www.hcd.ca.gov



December 2, 2021

Eric D. Shaw, Director
Mayor's Office of Housing and Community Development
City and County of San Francisco
1 South Van Ness Avenue
San Francisco, CA 94103

Dear Eric D. Shaw:

**RE: Award Announcement – Infill Infrastructure Grant Program
Notice of Funding Availability Fiscal Year 2020/2021, Round 7
City and County of San Francisco – Balboa Reservoir
Contract No. 21-IIG-16857**

The California Department of Housing and Community Development (Department) is pleased to announce City and County of San Francisco (Awardee) has been awarded an Infill Infrastructure Grant (IIG) Round 7 award in the amount of \$26,000,000. This letter constitutes notice of the designation of funds for the Awardee.

The Awardee will be able to draw down funds when the Standard Agreement is fully executed, and any general and special conditions have been cleared in writing.

The Department intends to issue a Standard Agreement within 90 days of receipt of the documentation required to execute this contract. A program representative will be in communication with you within a week to discuss and confirm any documents needed.

Congratulations on your successful application. For further information, please contact Lynn Jones, Section Chief, Program Design and Implementation Branch, (916) 695-6071 or Lynn.Jones@hcd.ca.gov.

Sincerely,

A handwritten signature in dark ink, appearing to read "Jennifer Deeger".

Jennifer Deeger
Deputy Director
Division of State Financial Assistance



October 23, 2024

Eric D. Shaw, Director
 Mayor's Office of Housing and Community Development
 City and County of San Francisco
 1 Van Ness Avenue
 San Francisco, CA 94103

Dear Eric D. Shaw

RE: Infill Infrastructure Grant, Round 8, Large Jurisdiction
Project: Balboa Reservoir QIA
Contract No. 21-IIG-16857
Remove Required QIP#1 Balboa Reservoir, Building C&D to replace with Balboa Reservoir, Building E; Remove QIP#3 Balboa Reservoir, Building F from the project; Add Balboa Reservoir, Building A as QIP #2

The California Department of Housing and Community Development (Department) previously awarded **the Mayor's Office of Housing and Community Development, City and County of San Francisco** (Awardee) \$26,000,000 on December 2, 2021. You advised the Department on July 14, 2024, that there was a change in the Qualifying Infill Projects (QIP) for this Qualifying Infill Area (QIA) and that we would be removing buildings C, D, and F of the Balboa Reservoir Master Plan. In their place you would like us to add a new QIP, Balboa Reservoir, Building A, to the QIA.

Included QIP's at the time of award:

	QIP Name	QIP (Describe unit mix and tenant population)	QIP Address	QIP City	QIP Zip	Census Tract	APN
Required QIP #1	Balboa Reservoir Building C & D	Balboa Reservoir Buildings C&D are a proposed new construction 249-unit market rate development located at 11 Frida Kahlo Way, in San Francisco, California. The project will offer a mix of studios, one bedrooms, two bedrooms, and three bedrooms, with amenities that include a work lounge, fitness center, and rooftop lounge.	11 Frida Kahlo Way	San Francisco	94112	6075031000	Block 3180/Lot 190
QIP #2	Balboa Reservoir Building E	Balboa Reservoir Building E is a proposed new construction 124-unit Low Income Housing Tax Credit (LIHTC) development located at 11 Frida Kahlo Way, in San Francisco, California. The property will offer 123 affordable rental units restricted to households earning 30, 50, 60, and 80 percent of the area median income.	11 Frida Kahlo Way	San Francisco	94112	6075031000	Block 3180/Lot 190
QIP #3	Balboa Reservoir Building F	Balboa Reservoir Building F is a proposed new construction 150-unit development located at 11 Frida Kahlo Way, in San Francisco, California. This entire development will provide affordable housing to educators in San Francisco. The Project will exceed City Green Standards with solar panels and an electric car	11 Frida Kahlo Way	San Francisco	94112	6075031000	Block 3180/Lot 190

As proposed:

Required QIP #1	Balboa Reservoir Building E	Balboa Reservoir Building E is a proposed new construction 128-unit Low Income Housing Tax Credit (LIHTC) development located at 11 Frida Kahlo Way, in San Francisco, California. The property will offer 127 affordable rental units restricted to households earning 30, 50, 60, and 80 percent of the area median income.	11 Frida Kahlo Way	San Francisco	94112	Saved to this # C D	Block 3180/Lot 190
QIP #2	Balboa Reservoir Building A	Balboa Reservoir Building A is a proposed new construction 159-unit Low Income Housing Tax Credit (LIHTC) development located at 11 Frida Kahlo Way, in San Francisco, California. The property will offer 158 affordable rental units restricted to households earning 30, 50, 60, and 80 percent of the area median income.	11 Frida Kahlo Way	San Francisco	94112	6075031000	Block 3180/Lot 190

This change will impact the approved award by \$5,904,384 The award is amended to \$20,095,616. The unit mix for this project is updated to the following for Required HD#1:

As Proposed				
Bdrms	% AMI	# Units	Max net rent	Proposed net rent
1	30%	15	\$1.101.00	\$1.101.00
1	50%	18	\$1.836.00	\$1.836.00
1	60%	23	\$2.203.00	\$2.203.00
2	30%	10	\$1.322.00	\$1.322.00
2	50%	6	\$2.056.00	\$2.056.00
2	60%	17	\$2.644.00	\$2.644.00
3	30%	6	\$1.498.00	\$1.498.00
3	50%	6	\$2.435.00	\$2.435.00
3	60%	20	\$2.850.00	\$2.850.00
2	manager	1	\$0.00	\$0.00
20	47%	122	\$17.945.00	\$17.945.00

For further information, please contact me at Barbara.Sargent@hcd.ca.gov or (916) 820-1285.

Sincerely,



Barbara Sargent
Climate Program Manager
Program Design & Implementation

[Development Agreement - Reservoir Community Partners, LLC - Balboa Reservoir Project]

Ordinance approving a Development Agreement between the City and County of San Francisco and Reservoir Community Partners, LLC, for the Balboa Reservoir Project (at the approximately 17.6-acre site located generally north of the Ocean Avenue commercial district, west of the City College of San Francisco Ocean Campus, east of the Westwood Park neighborhood, and south of Archbishop Riordan High School), with various public benefits, including 50% affordable housing and approximately 4 acres of publicly accessible parks and open space; making findings under the California Environmental Quality Act, findings of conformity with the General Plan, and with the eight priority policies of Planning Code, Section 101.1(b), and findings of public convenience, necessity, and welfare under Planning Code, Section 302; approving development impact fees and waiving any conflicting provision in Planning Code, Article 4, or Administrative Code, Article 10; confirming compliance with or waiving certain provisions of Administrative Code, Section 6.22 and Chapters 14B, 23, 41B, 56, 82, and 83, Planning Code, Sections 169, 138.1, and 414A, 415, and 422, Public Works Code, Section 806(d), Subdivision Code, Section 1348, and Health Code, Article 12C; and ratifying certain actions taken in connection therewith.

NOTE: **Unchanged Code text and uncodified text** are in plain Arial font.
Additions to Codes are in single-underline italics Times New Roman font.
Deletions to Codes are in ~~strikethrough italics Times New Roman font~~.
Board amendment additions are in double-underlined Arial font.
Board amendment deletions are in ~~strikethrough Arial font~~.
Asterisks (* * * *) indicate the omission of unchanged Code subsections or parts of tables.

Be it ordained by the People of the City and County of San Francisco:

///

1 Section 1. Project Findings. The Board of Supervisors makes the following findings:

2 (a) California Government Code Sections 65864 et seq. authorizes any city, county,
3 or city and county to enter into an agreement for the development of real property within the
4 jurisdiction of the city, county, or city and county.

5 (b) Pursuant to California Government Code Section 65865, Chapter 56 of the San
6 Francisco Administrative Code ("Chapter 56") sets forth certain procedures for the processing
7 and approval of development agreements in the City and County of San Francisco (the
8 "City").

9 (c) The City, under the jurisdiction of the San Francisco Public Utilities Commission
10 (the "SFPUC"), owns approximately 17 acres of undeveloped land located in the City that is
11 located generally north of the Ocean Avenue commercial district, west of the City College of
12 San Francisco Ocean Campus, east of the Westwood Park neighborhood, and south of
13 Archbishop Riordan High School (the "Project Site"). The Project Site is currently used for
14 surface parking.

15 (d) In November of 2016 the City sent written notices of availability regarding the
16 Project Site as required pursuant to California Government Code Section 52220 et.seq.

17 (e) On March 9, 2017, the City issued a Request for Proposals ("RFP") for the
18 disposition and development of the Project Site in accordance with the selection criteria
19 described in the RFP. In response to the RFP, the City evaluated proposals from nine
20 development teams, and selected a joint venture of BRIDGE Housing Corporation and
21 AvalonBay Communities, Inc. as the highest scoring proposer. The selected joint venture
22 formed Reservoir Community Partners, LLC, a Delaware limited liability company
23 ("Developer"), to plan, develop, and execute the Project.

24 (f) The City and Developer entered into an Exclusive Negotiating Agreement on
25 December 8, 2017 ("ENA") pursuant to which Developer, in coordination with the City, has

1 conducted pre-development evaluations and design studies of the Project Site and negotiated
2 the terms and conditions of a mixed income housing development of up to approximately
3 1,100 housing units, including approximately 550 units affordable to low- and moderate-
4 income households, approximately 4 acres of publicly accessible open spaces (including
5 property immediately adjacent to the south of the Project Site that contains an SFPUC
6 underground pipeline and will remain under the ownership of the City and the jurisdiction and
7 control of the SFPUC), a childcare center serving approximately 100 children, a community
8 room, ~~approximately 7,500 square feet of neighborhood serving retail space~~, 550 parking
9 spaces for use by residents and up to 450 parking spaces for use by the general public, in
10 addition to new streets, sidewalks, sewer and water infrastructure, including an Auxiliary
11 Water Supply System, and bicycle and pedestrian facilities, located on the Project Site (the
12 "Project").

13 (g) Developer filed an application with the City's Planning Department for approval
14 of a development agreement relating to the Project (the "Development Agreement") under
15 Chapter 56. A copy of the Development Agreement is on file with the Clerk of the Board of
16 Supervisors in File No. 200423.

17 (h) Concurrently with this ordinance, the Board of Supervisors is taking a number of
18 actions in furtherance of the Project, as generally described in the Development Agreement,
19 including Exhibit E to the Development Agreement.

20 (i) While the Development Agreement is between the City, acting primarily through
21 the Planning Department, and Developer, other City agencies retain a role in reviewing and
22 issuing certain later approvals for the Project. Later approvals include all approvals required
23 under the Balboa Reservoir Special Use District ("SUD") or as otherwise set forth in the
24 Municipal Code, approval of subdivision maps and plans for horizontal improvements and
25 public facilities, design review and approval of new buildings, and acceptance of Developer's

1 dedications of horizontal improvements and parks and open spaces for City maintenance and
2 liability under the Subdivision Code. As a result, affected City agencies have consented to the
3 Development Agreement.

4 (j) The Project is anticipated to deliver approximately 550 units of much needed
5 affordable housing and to generate approximately 460 construction jobs during construction
6 and an approximately \$1.7 Million annual increase in general fund revenues to the City. In
7 addition to the significant affordable housing, housing, jobs, transit-oriented development, and
8 economic benefits to the City from the Project, the City has determined that development of
9 the Project under the Development Agreement will provide additional benefits to the public
10 that could not be obtained through application of existing City ordinances, regulations, and
11 policies. These additional public benefits include: (1) affordable housing contributions in
12 amounts exceeding those required pursuant to existing City ordinances, regulations, and
13 policies and that are intended to constitute approximately 50% of the total number of housing
14 units in the Project; (2) workforce obligations, including the payment of the prevailing rate of
15 wages in all elements of construction of the Project, significant training, employment, and
16 economic development opportunities, related to the development and operation of the Project;
17 (3) construction and maintenance of publicly accessible open space, totaling approximately 4
18 acres; (4) delivery of a child care facility for approximately 100 children; (5) a community
19 meeting room; (6) construction of new sewer and water infrastructure, including an Auxiliary
20 Water Supply System; and (7) construction of new public streets and rights-of-way including
21 vehicular, bicycle, and pedestrian improvements, and a Project design that prioritizes and
22 promotes travel by walking, biking, and transit for new residents, tenants, employees, and
23 visitors; all as further described in the Development Agreement. The Development
24 Agreement will eliminate uncertainty in the City's land use planning for the Project Site and
25 secure orderly development.

1 (k) Funding for construction of the public infrastructure in the Project will include
2 special taxes under a community facilities district ("CFD") to be formed by Developer and the
3 City, as more particularly described in the Financing Plan attached to the Development
4 Agreement.

5
6 Section 2. Environmental Findings. On May 28, 2020, by Motion No. M-20730 the
7 Planning Commission certified as adequate, accurate, and complete the Final Environmental
8 Impact Report ("FEIR") for the Project pursuant to the California Environmental Quality Act
9 (California Public Resources Code Sections 21000 et seq.) ("CEQA"), the CEQA Guidelines
10 (14 CCR Sections 15000 et seq.), and Administrative Code Chapter 31. Also, on May 28,
11 2020, by Motion No. M-20731, the Planning Commission adopted environmental findings,
12 including a rejection of alternatives and a statement of overriding considerations ("CEQA
13 Findings") and a Mitigation Monitoring and Reporting Program ("MMRP"). These Planning
14 Commission Motions are on file with the Clerk of the Board in File No. 200423 and
15 incorporated herein by reference. In accordance with the actions contemplated in this
16 ordinance, the Board of Supervisors has reviewed the FEIR and related documents, and
17 adopts as its own and incorporates by reference herein the CEQA Findings, including the
18 statement of overriding considerations, and the MMRP.

19
20 Section 3. General Plan and Planning Code Findings.

21 (a) The Board of Supervisors will consider companion legislation concerning the
22 Balboa Reservoir Special Use District (the "SUD") that adopts public necessity findings under
23 Planning Code Section 302. The Board also will consider companion legislation that adopts
24 General Plan amendments and makes findings of consistency with the General Plan, as
25 proposed for amendment, and the eight priority policies of Planning Code Section 101.1(b).

1 Copies of the companion legislation are on file with the Clerk of the Board of Supervisors in
2 File Nos. 200422 and 200635, respectively, and they are incorporated herein by reference.

3 (b) For purposes of this ordinance, the Board of Supervisors finds that the
4 Development Agreement will serve the public necessity, convenience, and general welfare
5 under Planning Code Section 302 for the reasons set forth in the companion legislation on the
6 SUD identified in subsection 3(a).

7 (c) For purposes of this ordinance, the Board of Supervisors finds that the
8 Development Agreement is in conformity with the General Plan, as proposed for amendment,
9 and the eight priority policies of Planning Code Section 101.1(b) for the reasons set forth in
10 the companion legislation on the General Plan amendments identified in subsection 3(a).

11
12 Section 4. Development Agreement.

13 (a) The Board of Supervisors approves all of the terms and conditions of the
14 Development Agreement, in substantially the form on file with the Clerk of the Board in File
15 No. 200423.

16 (b) The Board of Supervisors approves and authorizes the execution, delivery, and
17 performance by the City of the Development Agreement as follows: (1) the Director of
18 Planning and (other City officials listed thereon) are authorized to execute and deliver the
19 Development Agreement, with signed consents of those City departments, agencies, boards,
20 commissions, and bureaus that have disposition, subdivision or other permit, entitlement, or
21 approval authority or jurisdiction over development of the Project, or any improvement located
22 on or off the Project Site, including the San Francisco Public Utilities Commission, San
23 Francisco Municipal Transportation Agency, Department of Public Works, and Fire
24 Department; and (2) the Director of Planning, the General Manager of the San Francisco
25 Public Utilities Commission, the Director of the Mayor's Office of Housing and Community

1 Development, and other applicable City officials are authorized to take all actions reasonably
2 necessary or prudent to perform the City's obligations under the Development Agreement in
3 accordance with its terms.

4 (c) The Director of Planning, at the Director's discretion and in consultation with the
5 City Attorney, is authorized to enter into any additions, amendments, or other modifications to
6 the Development Agreement that the Director of Planning determines are in the best interests
7 of the City and that do not materially increase the obligations or liabilities of the City or
8 materially decrease the benefits to the City as provided in the Development Agreement.

9
10 Section 5. Development Impact Fees.

11 By approving the Development Agreement, the Board of Supervisors authorizes the
12 Controller and City Departments to accept the funds paid by Developer as set forth therein,
13 and to appropriate and use the funds for the purposes described therein. The Board
14 expressly approves the use of the development impact fees as set forth in the Development
15 Agreement, and waives or overrides any provision in Article 4 of the Planning Code and
16 Article 10 of the Administrative Code that would conflict with the uses of these funds as
17 described in the Development Agreement.

18
19 Section 6. Administrative Code Chapter 56 Conformity. The Development Agreement
20 shall prevail in the event of any conflict between the Development Agreement and
21 Administrative Code Chapter 56, and without limiting the generality of the foregoing, the
22 following provisions of Chapter 56 are waived or deemed satisfied as follows:

23 (a) Reservoir Community Partners, LLC, a Delaware limited liability company, and
24 its successors and assignees permitted under the Development Agreement, shall constitute a
25 permitted "Applicant/Developer" for purposes of Section 56.3(b).

1 (b) The Project comprises approximately 17 acres, and is the type of large multi-
2 phase and/or mixed-use development contemplated by the Administrative Code and therefore
3 satisfies Section 56.3(g).

4 (c) The provisions of the Development Agreement and the Workforce Agreement
5 attached to the Development Agreement as Exhibit I shall apply in lieu of Section 56.7(c).

6 (d) The provisions of the Development Agreement regarding any amendment or
7 termination, including those relating to "Material Change," shall apply in lieu of Sections 56.15
8 and 56.18.

9 (e) The provisions of Section 56.20 are satisfied by the terms of the ENA, a copy of
10 which is on file with the Clerk of the Board of Supervisors in File No. 200423.

11
12 Section 7. Administrative Code Chapter 56 Waiver; Ratification.

13 (a) In connection with the Development Agreement, the Board of Supervisors finds
14 that the City has substantially complied with the requirements of Administrative Code Chapter
15 56, and waives any procedural or other requirements if and to the extent not strictly complied
16 with.

17 (b) All actions taken by City officials in preparing and submitting the Development
18 Agreement to the Board of Supervisors for review and consideration are hereby ratified and
19 confirmed, and the Board of Supervisors hereby authorizes all subsequent action to be taken
20 by City officials consistent with this ordinance.

21
22 Section 8. Planning Code Waivers; Ratification.

23 (a) The Board of Supervisors finds that the impact fees and other exactions due
24 under the Development Agreement will provide greater benefits to the City than the impact
25 fees and exactions under Planning Code Article 4 and waives the application of, and to the

1 extent applicable exempts the Project from, impact fees and exactions under Planning Code
2 Article 4 on the condition that Developer pays the impact fees and exactions due under the
3 Development Agreement.

4 (b) The Board of Supervisors finds that the Transportation Demand Management
5 Plan ("TDM Plan") attached to the Development Agreement and other provisions of the
6 Development Agreement comply with the City's Transportation Demand Management
7 Program in Planning Code Section 169.

8 (c) The Board of Supervisors finds that the Master Infrastructure Plan attached to
9 the Development Agreement sets forth sufficient standards for streetscape design and waives
10 the requirements of Planning Code Section 138.1 (Streetscape and Pedestrian
11 Improvements).

12 (d) The Board of Supervisors finds that the Affordable Housing Plan attached to the
13 Development agreement meets and exceeds the requirements for the provision of affordable
14 housing under Planning Code Section 415 et seq. and waives the application of Section 415
15 et seq. to the Project on the condition that Developer implements and complies with the
16 Affordable Housing Plan. The Board of Supervisors urges that the Director of the Mayor's
17 Office of Housing and Community Development include an option in the Affordable Housing
18 Plan requiring the Developer to convey to the City the affordable housing properties on the
19 Project Site that include City funding in the future financing of the affordable housing
20 development.

21 (e) The Board of Supervisors finds that the Development Agreement provides
22 sufficient benefits and community improvements regarding open space, streetscape, and
23 childcare facilities and waives the requirements of Planning Code Section 422 (Balboa Park
24 Community Improvements Fund).

25 ///

1 (f) The Board of Supervisors finds that the Child Care Program attached to the
2 Development Agreement meets and exceeds the requirements for the provision of childcare
3 under Planning Code Section 414A and waives the requirements of Section 414A (Childcare
4 Requirements for Residential Projects).

5
6 Section 9. Other Administrative Code Waivers.

7 (a) The requirements of the Workforce Agreement attached to the Development
8 Agreement shall apply and shall supersede, to the extent of any conflict, the provisions of
9 Administrative Code: (1) Chapter 82 (Local Hire Requirements, Coverage); (2) Chapter 83
10 (First Source Hiring for Construction); (3) Chapter 14B (Local Business Enterprise Utilization
11 and Nondiscrimination in Contracting Ordinance); (4) Chapter 6, Article II, Section 6.22 (Public
12 Work Construction Contract Terms and Working Conditions); and (5) Chapter 23, Article VII
13 (Prevailing Wage, Apprenticeship, and Local Hire Requirements).

14 (b) The Board of Supervisors finds that the competitive selection process for the
15 disposition of the Project Site and the subsequent negotiation of the Development Agreement,
16 including the affordable housing obligations set forth therein, satisfy the goals of
17 Administrative Code Chapter 41B (Community Opportunity to Purchase) and waives the
18 application of Chapter 41B to the Project Site.

19 (c) Pursuant to Resolution No. 85-18, the Board of Supervisors considered an
20 economic study of the Project and found that the plan to undertake and implement the Project
21 was fiscally feasible and responsible. In addition, the Controller conducted an economic
22 impact report of the Project, which is included in Clerk of the Board of Supervisors File No.
23 200423. The Board of Supervisors finds that due to current exigencies of the pandemic and
24 the housing crisis in San Francisco, the number of analyses of the Project that have been
25 conducted, and the depth of analysis and sophistication required to appraise the Project Site,

1 an Appraisal Review of the Project Site is not necessary and waives the Administrative Code
2 Section 23.3 requirement of an Appraisal Review as it relates to the Project Site.

3
4 Section 10. Subdivision Code Waivers.

5 A Public Improvement Agreement, if applicable, shall include provisions consistent with
6 the Development Agreement and the applicable requirements of the Municipal Code and the
7 Subdivision Regulations regarding extensions of time and remedies that apply when
8 improvements are not completed within the agreed time. Accordingly, the Board of
9 Supervisors waives the application to the Project of Subdivision Code Section 1348 (Failure to
10 Complete Improvements within Agreed Time).

11
12 Section 11. Public Works Code Waiver; Planning Code Waiver.

13 The Board of Supervisors finds that the Master Infrastructure Plan attached to the
14 Development Agreement sets forth sufficient standards for streetscape design and waives the
15 requirements of Planning Code Section 138.1 (Streetscape and Pedestrian Improvements)
16 and Public Works Code Section 806(d) (Required Street Trees for Development Projects).

17
18 Section 12. Health Code Waiver.

19 The Board of Supervisors finds that the Project will provide substantial water supply
20 benefits by using non-potable water reuse in portions of the Project. The Board of
21 Supervisors further finds that, but for specialized and unique water meter configurations, the
22 Townhouses described in greater detail in the Development Agreement would have been
23 exempt from the application of Article 12C of the Health Code. Finally, the Board of
24 Supervisors finds that the immediate and effective construction of the Affordable Units
25 described in greater detail in the Development Agreement is a high priority due to severe

1 housing and economic conditions existing at this time. In accordance with these findings, the
2 Board of Supervisors waives the requirements of Article 12C of the Health Code to the extent
3 such requirements would otherwise apply to the construction of the Townhouse Units and
4 Affordable Units.

5
6 Section 13. Effective and Operative Date.

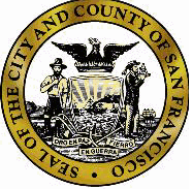
7 (a) This ordinance shall become effective 30 days from the date of enactment.
8 Enactment occurs when the Mayor signs the ordinance, the Mayor returns the ordinance
9 unsigned or does not sign the ordinance within ten days of receiving it, or the Board of
10 Supervisors overrides the Mayor's veto of the ordinance.

11 (b) This ordinance shall become operative only on (and no rights or duties are affected
12 until) the later of (a) its effective date, as stated in subsection (a), or (b) the date that both the
13 SUD ordinance and the General Plan ordinance referred to in subsection 3(a) related to the
14 Development Agreement, have become effective. Copies of these ordinances are on file with
15 the Clerk of the Board of Supervisors in File Nos. 200422 and 200635, respectively.

16
17 APPROVED AS TO FORM:
18 DENNIS J. HERRERA, City Attorney

19 By: /s/ ELIZABETH A. DIETRICH
20 ELIZABETH A. DIETRICH
21 Deputy City Attorney

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City and County of San Francisco
Tails
Ordinance

City Hall
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4689

File Number: 200423

Date Passed: August 18, 2020

Ordinance approving a Development Agreement between the City and County of San Francisco and Reservoir Community Partners, LLC, for the Balboa Reservoir Project (at the approximately 17.6-acre site located generally north of the Ocean Avenue commercial district, west of the City College of San Francisco Ocean Campus, east of the Westwood Park neighborhood, and south of Archbishop Riordan High School), with various public benefits, including 50% affordable housing and approximately four acres of publicly accessible parks and open space; making findings under the California Environmental Quality Act, findings of conformity with the General Plan, and with the eight priority policies of Planning Code, Section 101.1(b), and findings of public convenience, necessity, and welfare under Planning Code, Section 302; approving development impact fees and waiving any conflicting provision in Planning Code, Article 4, or Administrative Code, Article 10; confirming compliance with or waiving certain provisions of Administrative Code, Section 6.22 and Chapters 14B, 23, 41B, 56, 82, and 83, Planning Code, Sections 169, 138.1, 414A, 415, and 422, Public Works Code, Section 806(d), Subdivision Code, Section 1348, and Health Code, Article 12C; and ratifying certain actions taken in connection therewith, as defined herein.

July 29, 2020 Budget and Finance Committee - AMENDED, AN AMENDMENT OF THE WHOLE BEARING SAME TITLE

July 29, 2020 Budget and Finance Committee - AMENDED

July 29, 2020 Budget and Finance Committee - MOTION

July 29, 2020 Budget and Finance Committee - REFERRED WITHOUT RECOMMENDATION AS AMENDED

August 11, 2020 Board of Supervisors - PASSED ON FIRST READING

Ayes: 11 - Fewer, Haney, Mandelman, Mar, Peskin, Preston, Ronen, Safai, Stefani, Walton and Yee

August 18, 2020 Board of Supervisors - FINALLY PASSED

Ayes: 10 - Fewer, Haney, Mandelman, Mar, Peskin, Preston, Ronen, Stefani, Walton and Yee
Excused: 1 - Safai

File No. 200423

I hereby certify that the foregoing
Ordinance was FINALLY PASSED on
8/18/2020 by the Board of Supervisors of
the City and County of San Francisco.



Angela Calvillo
Clerk of the Board



London N. Breed
Mayor

8.28.20

Date Approved

1 [Apply for Grant - Department of Housing and Community Development Infill Infrastructure
2 Program - Balboa Reservoir Project]

3 **Resolution authorizing the Mayor’s Office of Housing and Community Development, on**
4 **behalf of the City and County of San Francisco, to execute a grant application, as**
5 **defined herein, under the Department of Housing and Community Development Infill**
6 **Infrastructure (“IIG”) Program for the project area located generally north of the Ocean**
7 **Avenue commercial district, west of City College of San Francisco Ocean Campus, east**
8 **of the Westwood Park neighborhood and south of Archbishop Riordan High School**
9 **(“Balboa Reservoir”); authorizing the City to assume liability for completion of the**
10 **project required by the terms of any grant awarded under the IIG Program; and**
11 **adopting findings under the California Environmental Quality Act (“CEQA”), the CEQA**
12 **Guidelines, and Administrative Code, Chapter 31.**

13
14 WHEREAS, The State of California Department of Housing and Community
15 Development (“Department”) has issued a Notice of Funding Availability (“NOFA”) dated May
16 12, 2021, under the Infill Infrastructure (“IIG”) Program established under Division 31, Part
17 12.5 of the Health and Safety Code commencing with Section 53559; and

18 WHEREAS, The Department is authorized to approve funding allocations for the IIG
19 Program, subject to the terms and conditions of the NOFA IIG Program Grant Guidelines
20 adopted by the Department on October 30, 2019 (“Program Guidelines”), an application
21 package released by the Department for the IIG Program (“Application Package”), and an IIG
22 standard agreement with the State of California (“Standard Agreement”), the Department is
23 authorized to administer the approved funding allocations of the IIG Program; and
24
25

1 WHEREAS, The IIG Program provides infrastructure grants for Capital Improvement
2 Projects in support of Qualifying Infill Projects or Qualifying Infill Areas to applicants, for the
3 development of projects that, per the Program Guidelines, support higher-density affordable
4 and mixed-income housing and mixed-use infill developments; and

5 WHEREAS, BHC Balboa Builders LLC, a California limited liability corporation
6 ("Developer"), has requested the City and County of San Francisco (the "City"), acting by and
7 through the Mayor's Office of Housing and Community Development ("MOHCD"), to assist the
8 Developer with funding for the infrastructure improvements for the Balboa Reservoir (the
9 "Qualifying Infill Area"), which includes four 100% affordable housing projects, as part of the
10 Balboa Reservoir Development Agreement (File No. 200423); and

11 WHEREAS, On May 28, 2020, by Motion No. 20730, the Planning Commission
12 certified as adequate, accurate, and complete the Final Environmental Impact Report ("FEIR")
13 for the Project pursuant to the California Environmental Quality Act (California Public
14 Resources Code Sections 21000 et seq.) ("CEQA"), the CEQA Guidelines (1a4 CCR Sections
15 15000 et seq.), and Administrative Code, Chapter 31; a copy of Planning Commission Motion
16 No. 20730 is on file with the Clerk of the Board of Supervisors in File No. 200635; also, on
17 May 28, 2020, by Motion No. 20731, the Planning Commission adopted environmental
18 findings, including a rejection of alternatives and a statement of overriding considerations
19 ("CEQA Findings") and a Mitigation Monitoring and Reporting Program ("MMRP"); these
20 Motions are on file with the Clerk of the Board in File No. 200635; in accordance with the
21 actions contemplated in this ordinance, the Board of Supervisors has reviewed the FEIR and
22 related documents, and adopts as its own and incorporates by reference herein the CEQA
23 Findings, including the statement of overriding considerations, and the MMRP; and

24 WHEREAS, The City, acting by and through MOHCD, desires to apply for IIG Program
25 for \$26,000,000 in funds and submit an Application Package to assist the Developer fund the

1 infrastructure improvements for the Project; now, therefore, be it

2 RESOLVED, That the Board of Supervisors delegates to MOHCD, on behalf of the
3 City, the authority to execute an application to the IIG Program as detailed in the NOFA dated
4 May 12, 2021, in a total amount not to exceed \$26,000,000 of which the entire amount will be
5 provided as a grant for Capital Infrastructure Improvements as defined the IIG Program
6 Guidelines and sign the IIG Program documents; and, be it

7 FURTHER RESOLVED, The Board of Supervisors specifically agrees that the City
8 shall assume liability for completion of the Project required by the terms of any grant awarded
9 to the City under the IIG Program; and, be it

10 FURTHER RESOLVED, That the Board of Supervisors acknowledges that if the
11 Application is successful, the City, through MOHCD, shall seek Board of Supervisors approval
12 of the IIG Standard Agreement, with terms and conditions that IIG Program funds are to be
13 used for allowable capital asset project expenditures to be identified in the Standard
14 Agreement, that the Application Package in full is incorporated as part of the Standard
15 Agreement, and that any and all activities funded, information provided, and timelines
16 represented in the application are enforceable through the Standard Agreement; and, be it

17 FURTHER RESOLVED, That the Board of Supervisors authorizes the Director of
18 MOHCD (or his designee) to execute and deliver any documents in the name of the City that
19 are necessary, appropriate or advisable to secure the IIG Program funds from the
20 Department, and all amendments thereto, and complete the transactions contemplated herein
21 and to use the funds for eligible capital asset(s) in the manner presented in the application as
22 approved by the Department and in accordance with the NOFA and Program Guidelines and
23 Application Package; and, be it

24 FURTHER RESOLVED, That all actions authorized and directed by this Resolution and
25 heretofore taken are ratified, approved and confirmed by this Board of Supervisors.

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RECOMMENDED:

/S/_____

Eric D. Shaw, Director,
Mayor’s Office of Housing and Community Development



City and County of San Francisco
Tails
Resolution

City Hall
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4689

File Number: 210837

Date Passed: September 14, 2021

Resolution authorizing the Mayor's Office of Housing and Community Development, on behalf of the City and County of San Francisco, to execute a grant application, as defined herein, under the Department of Housing and Community Development Infill Infrastructure ("IIG") Program for the project area located generally north of the Ocean Avenue commercial district, west of City College of San Francisco Ocean Campus, east of the Westwood Park neighborhood, and south of Archbishop Riordan High School ("Balboa Reservoir"); authorizing the City to assume liability for completion of the project required by the terms of any grant awarded under the IIG Program; and adopting findings under the California Environmental Quality Act ("CEQA"), the CEQA Guidelines, and Administrative Code, Chapter 31.

September 08, 2021 Budget and Finance Committee - AMENDED, AN AMENDMENT OF THE WHOLE BEARING NEW TITLE

September 08, 2021 Budget and Finance Committee - RECOMMENDED AS AMENDED

September 14, 2021 Board of Supervisors - ADOPTED

Ayes: 11 - Chan, Haney, Mandelman, Mar, Melgar, Peskin, Preston, Ronen, Safai, Stefani and Walton

File No. 210837

I hereby certify that the foregoing
Resolution was **ADOPTED** on 9/14/2021 by
the Board of Supervisors of the City and
County of San Francisco.

Angela Calvillo
Clerk of the Board

London N. Breed
Mayor

09/24/2021

Date Approved



San Francisco Ethics Commission

25 Van Ness Avenue, Suite 220, San Francisco, CA 94102

Phone: 415.252.3100 . Fax: 415.252.3112

ethics.commission@sfgov.org . www.sfethics.org

Received On:

File #: 250394

Bid/RFP #:

Notification of Contract Approval

SFEC Form 126(f)4

(S.F. Campaign and Governmental Conduct Code § 1.126(f)4)

A Public Document

Each City elective officer who approves a contract that has a total anticipated or actual value of \$100,000 or more must file this form with the Ethics Commission within five business days of approval by: (a) the City elective officer, (b) any board on which the City elective officer serves, or (c) the board of any state agency on which an appointee of the City elective officer serves. For more information, see: <https://sfethics.org/compliance/city-officers/contract-approval-city-officers>

1. FILING INFORMATION

TYPE OF FILING

Original

DATE OF ORIGINAL FILING (for amendment only)

AMENDMENT DESCRIPTION – Explain reason for amendment

2. CITY ELECTIVE OFFICE OR BOARD

OFFICE OR BOARD

Board of Supervisors

NAME OF CITY ELECTIVE OFFICER

Members

3. FILER'S CONTACT

NAME OF FILER'S CONTACT

Legislative Clerks Division

TELEPHONE NUMBER

415-554-5184

FULL DEPARTMENT NAME

Office of the Clerk of the Board

EMAIL

Board.of.Supervisors@sfgov.org

4. CONTRACTING DEPARTMENT CONTACT

NAME OF DEPARTMENTAL CONTACT

Ryan vanZuylen

DEPARTMENT CONTACT TELEPHONE NUMBER

415-701-5500

FULL DEPARTMENT NAME

MYR Mayor's Office of Comm Dev

DEPARTMENT CONTACT EMAIL

ryan.vanzuylen@sfgov.org

5. CONTRACTOR	
NAME OF CONTRACTOR BHC Balboa Builders LLC	TELEPHONE NUMBER 415-321-4057
STREET ADDRESS (including City, State and Zip Code) 350 California Street, 16th Floor, SF CA	EMAIL jmooyman@bridgehousing.com

6. CONTRACT		
DATE CONTRACT WAS APPROVED BY THE CITY ELECTIVE OFFICER(S)	ORIGINAL BID/RFP NUMBER	FILE NUMBER (If applicable) 250394
DESCRIPTION OF AMOUNT OF CONTRACT \$20,095,616		
NATURE OF THE CONTRACT (Please describe) Accept and Expend resolution for CA HCD IIG program grant funds in the amount of \$20,095,616 for infrastructure for two 100% affordable projects known as Balboa Reservoir Buildings E and A.		

7. COMMENTS

8. CONTRACT APPROVAL	
This contract was approved by:	
<input type="checkbox"/>	THE CITY ELECTIVE OFFICER(S) IDENTIFIED ON THIS FORM
<input checked="" type="checkbox"/>	A BOARD ON WHICH THE CITY ELECTIVE OFFICER(S) SERVES Board of Supervisors
<input type="checkbox"/>	THE BOARD OF A STATE AGENCY ON WHICH AN APPOINTEE OF THE CITY ELECTIVE OFFICER(S) IDENTIFIED ON THIS FORM SITS

9. AFFILIATES AND SUBCONTRACTORS

List the names of (A) members of the contractor's board of directors; (B) the contractor's principal officers, including chief executive officer, chief financial officer, chief operating officer, or other persons with similar titles; (C) any individual or entity who has an ownership interest of 10 percent or more in the contractor; and (D) any subcontractor listed in the bid or contract.

#	LAST NAME/ENTITY/SUBCONTRACTOR	FIRST NAME	TYPE
1	Lombard	Ken	CEO
2	Sherman	Delphine	COO
3	Atilano	Sierra	Other Principal Officer
4	Seshadri	Smita	Other Principal Officer
5	Van Benschoten	ELizabeth	Other Principal Officer
6	Clark	Sean	Other Principal Officer
7	Brown	Eric R.	Other Principal Officer
8	Hlebasko	Rebecca	Other Principal Officer
9	Jagodzinski	Mary Jane	Other Principal Officer
10	Haynes Martin	Melissa	Other Principal Officer
11	Neufeld Paul	Susan	Other Principal Officer
12	Williams	Natalia	Other Principal Officer
13	Lund	Erik	Other Principal Officer
14	Estrada-Nino	Maria	Other Principal Officer
15	Hahn	Tina	Other Principal Officer
16	Hesse	Thomas	Other Principal Officer
17	Miranda	Kristine	Other Principal Officer
18	Novak	Kenneth M.	Board of Directors
19	Grodahl	Skip	Board of Directors

9. AFFILIATES AND SUBCONTRACTORS

List the names of (A) members of the contractor's board of directors; (B) the contractor's principal officers, including chief executive officer, chief financial officer, chief operating officer, or other persons with similar titles; (C) any individual or entity who has an ownership interest of 10 percent or more in the contractor; and (D) any subcontractor listed in the bid or contract.

#	LAST NAME/ENTITY/SUBCONTRACTOR	FIRST NAME	TYPE
20	Quinn	Adrienne	Board of Directors
21	Moore	Connie	Board of Directors
22	Hemmenway	Nancy	Board of Directors
23	Richardson	Stephen A.	Board of Directors
24	Bibby	Douglas M.	Board of Directors
25	Hernandez	Jennifer L.	Board of Directors
26	Carlisle	Ray	Board of Directors
27	Carter	Darby J.	Board of Directors
28	Freed	Robert	Board of Directors
29	Jain	Kiran	Board of Directors
30	Stein	Paul	Board of Directors
31	Turner	Molly	Board of Directors
32	Sagar	Nadia	Board of Directors
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9. AFFILIATES AND SUBCONTRACTORS

List the names of (A) members of the contractor's board of directors; (B) the contractor's principal officers, including chief executive officer, chief financial officer, chief operating officer, or other persons with similar titles; (C) any individual or entity who has an ownership interest of 10 percent or more in the contractor; and (D) any subcontractor listed in the bid or contract.

#	LAST NAME/ENTITY/SUBCONTRACTOR	FIRST NAME	TYPE
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☐ Check this box if you need to include additional names. Please submit a separate form with complete information. Select "Supplemental" for filing type.

10. VERIFICATION

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information I have provided here is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

SIGNATURE OF CITY ELECTIVE OFFICER OR BOARD SECRETARY OR CLERK

DATE SIGNED

BOS Clerk of the Board

Mayor's Office of Housing and Community Development
City and County of San Francisco



Daniel Lurie
Mayor

Daniel Adams
Director

TO: Angela Calvillo, Clerk of the Board of Supervisors

From: Benjamin McCloskey, Deputy Director Mayor's Office of Housing and Community Development

DATE: April 8, 2025

SUBJECT: Accept and Expend Resolution for Infill Infrastructure Grant (IIG) Program at Balboa Reservoir Buildings A and E

GRANT TITLE: Infill Infrastructure Grant (IIG) Program – Balboa Reservoir Buildings A and E

Attached please find the original and 2 copies of each of the following:

- X Proposed resolution; original signed by Department, Mayor, Controller
- X Grant information form
- X Grant budget
- X Ethics Form 126
- X Grant application
- X Grant award letter from funding agency
- X Grant agreement

N/A Other (Explain):

Departmental representative to receive a copy of the adopted resolution:

Name: Benjamin McCloskey
Phone: 628-652-5956
Interoffice Mail Address: Benjamin.McCloskey@sfgov.org
Certified copy required Yes ☐

No ☒

OFFICE OF THE MAYOR
SAN FRANCISCO



DANIEL LURIE
MAYOR

TO: Angela Calvillo, Clerk of the Board of Supervisors
FROM: Adam Thongsavat, Liaison to the Board of Supervisors
RE: [Execute Standard Agreement and Accept and Expend Grant - California Department of Housing and Community Development Infill Infrastructure Grant Program – Balboa Reservoir Building E and Balboa Reservoir Building A - \$20,095,616]
DATE: April 15, 2025

Resolution authorizing the Mayor's Office of Housing and Community Development ("MOHCD") to execute a Standard Agreement with California Department of Housing and Community Development ("HCD") under the Infill Infrastructure Grant Program for a total award of \$20,095,616, disbursed by HCD as a grant to the City for infrastructure improvements related to property located at Balboa Reservoir Building E and Balboa Reservoir Building A for 100% affordable housing projects ("Project") for the period starting on the execution date of the Standard Agreement to June 30, 2030, and as amended.

Should you have any questions, please contact Adam Thongsavat at adam.thongsavat@sfgov.org