

File No. 250392

Committee Item No. 15

Board Item No. 20

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 |
| | | • Grant Standard Agreement |
| | | • Loan Standard 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 2/24/2021</u> |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <u>Executed Implementation and Mutual Indemnity Agreement 6/8/2021</u> |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <u>Notice of Funding Availability 2/26/2021</u> |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <u>Amended Notice of Funding Availability 10/14/2021</u> |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <u>Board Resolution No. 142-20 8/28/2020</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 [Accept and Expend Grant - California Department of Housing and Community Development -
2 Affordable Housing and Sustainable Communities Program - Balboa Reservoir Building E-
3 \$29,585,486]

4 **Resolution authorizing the Mayor’s Office of Housing and Community Development**
5 **(“MOHCD”) to execute the Standard Agreement with the California Department of**
6 **Housing and Community Development (“HCD”) under the Affordable Housing and**
7 **Sustainable Communities Program for a total award of \$29,585,486 including**
8 **\$19,610,404 disbursed by HCD as a loan to the Balboa Lee Avenue, L.P. for a 100%**
9 **affordable housing project at 11 Frida Kahlo, also identified as Balboa Reservoir**
10 **Building E, and \$9,975,082 to be disbursed as a grant to the City for public**
11 **transportation improvements near 11 Frida Kahlo, for the period starting on the**
12 **execution date of the Standard Agreements through November 30, 2042; and**
13 **authorizing MOHCD to accept and expend the grant of up to \$9,975,082 for**
14 **transportation, streetscape and pedestrian improvements and other transit oriented**
15 **programming and improvement as approved by HCD.**

16
17 WHEREAS, The State of California, the Strategic Growth Council (“SGC”) and the
18 California Department of Housing and Community Development (“HCD”) issued a Notice of
19 Funding Availability (“NOFA”) dated February 26, 2021, as amended October 14, 2021, under
20 the Affordable Housing and Sustainable Communities (“AHSC”) Program established under
21 Division 44, Part 1 of the Public Resources Code commencing with Section 75200; and

22 WHEREAS, The SGC is authorized to approve funding allocations for the AHSC
23 Program, subject to the terms and conditions of the NOFA, AHSC Program Guidelines
24 adopted by SGC on February 24, 2021 (“Program Guidelines”), an application package
25

1 released by HCD for the AHSC Program (“Application Package”), and AHSC STD 213 and
2 STD 215 standard agreements with the State of California (“Standard Agreements”), and HCD
3 is authorized to administer the approved funding allocations of the AHSC Program; and

4 WHEREAS, The AHSC Program provides grants and loans to applicants identified
5 through a competitive process for the development of projects that, per the Program
6 Guidelines, will create new affordable housing and achieve greenhouse gas reductions and
7 benefit disadvantaged communities through increased accessibility to affordable housing,
8 employment centers and key destinations via low-carbon transportation; and

9 WHEREAS, The AHSC Program requires that joint applicants for a project will be held
10 jointly and severally liable for completion of such project; and

11 WHEREAS, Balboa Lee Avenue, L.P., a California limited partnership (“Developer”),
12 requested that the City and County of San Francisco (the “City”), acting by and through
13 Mayor’s Office of Housing and Community Development (“MOHCD”), be a joint applicant for
14 AHSC Program funds for its project located at 11 Frida Kahlo Way consisting of new
15 construction of a 128-unit 100% affordable multifamily rental housing development affordable
16 to low-income households (the “Project”) identified as Balboa Reservoir Building E (“Balboa
17 Reservoir Building E”); and

18 WHEREAS, In order to be highly competitive for the AHSC funds, the Developer and
19 MOHCD applied for AHSC grant funds to purchase Bay Area Rapid Transit (“BART”) vehicles
20 (“BART vehicles”) in order to further reduce greenhouse gas emissions; and

21 WHEREAS, On June 21, 2021, BART and the Developer entered into an
22 Implementation Agreement to make commitments related to the purchase of the BART
23 vehicles as included in the Application package; and

24 WHEREAS, On August 18, 2020, by Ordinance No. 142-20, the Board of Supervisors
25 made findings under the California Environmental Quality Act (Public Resources Code,

1 Sections 21000 et seq.) and findings of consistency with the General Plan, and the eight
2 priority policies of Planning Code, Section 101.1, which Ordinance is on file with the Clerk of
3 the Board of Supervisors in File No. 200423 and is incorporated herein by reference; and

4 WHEREAS, HCD proposes to maximize the use of available grant funds on program
5 expenditures by not including indirect costs in the grant budget; and

6 WHEREAS, Through an award letter dated February 4, 2022, HCD made an award in
7 the total amount of \$29,585,486, which includes \$19,610,404 to be disbursed by HCD as a
8 loan to the Developer for the Project, and up to \$9,975,082 to be disbursed as a grant to the
9 City for the BART vehicles and other transit-oriented programming and improvements
10 approved by HCD, subject to the terms and conditions of the Standard Agreements, copies of
11 which are on file with the Clerk of the Board of Supervisors in File No. 250392; now, therefore,
12 be it

13 RESOLVED, That the Board of Supervisors approves and authorizes the MOHCD to
14 enter into the Standard Agreements with HCD, with terms and conditions that AHSC Program
15 funds are to be used for allowable capital asset project expenditures identified in Exhibit A;
16 and, be it

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

19 FURTHER RESOLVED, That the Board Supervisors authorizes the City to accept and
20 expend the grant funds disbursed under the Standard Agreements; and, be it

21 FURTHER RESOLVED, That the Board of Supervisors authorizes the Director of
22 MOHCD (or his designee) to execute and deliver any documents in the name of the MOHCD
23 that are necessary, appropriate or advisable to accept and expend the AHSC Program funds
24 from HCD, and all amendments thereto, and complete the transactions contemplated herein
25 and to use the funds for eligible capital asset(s) in the manner presented in the application as

1 approved by HCD and in accordance with the NOFA and Program Guidelines and Application
2 Package; and, be it

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

5 FURTHER RESOLVED, That within thirty (30) days of the Standard Agreements being
6 fully executed by all parties, MOHCD shall provide the final agreement to the Clerk of the
7 Board for inclusion into the official file.

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1 Recommended:

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

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6 Approved:

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8 /s/
Daniel Lurie, Mayor

9 /s/
Greg Wagner, Controller

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File Number: 250392
(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: Affordable Housing and Sustainable Communities Program – 11 Frida Kahlo Way – Balboa Reservoir Building 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: \$9,975,082

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: Transportation, streetscape, pedestrian improvements, other transit oriented programming and improvement

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

Start-Date: TBD End-Date: 11/30/2042

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 | 11:42 AM PST

DocuSigned by:

(Signature Required)

STANDARD AGREEMENT

STD 213 (Rev. 04/2020)

AGREEMENT NUMBER

21-AHSC-17012

PURCHASING AUTHORITY NUMBER (if applicable)

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

BRIDGE Housing Corporation, and City and County of San Francisco

2. The term of this Agreement is:

START DATE

Upon HCD Approval

THROUGH END DATE

11/30/2042

3. The maximum amount of this Agreement is:

\$9,975,082.00

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	5
Exhibit B	Budget Detail and Payment Provisions	4
Exhibit C*	State of California General Terms and Conditions	GTC - 04/2017
Exhibit D	AHSC Program Terms and Conditions	16
Exhibit E	Project Specific Provisions and Special Terms and Conditions	13
TOTAL NUMBER OF PAGES ATTACHED		38

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.)

See Attached

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

California Department of General Services Approval (or exemption, if applicable)

Exempt per; SCM Vol. 1 4.04.A.3 (DGS memo dated 06/12/1981)

CONTRACTOR

BRIDGE Housing Corporation

a California nonprofit public benefit corporation

By: _____ Date: _____

Smitha Seshadri
Executive Vice President

Address:

600 California Street, Suite 900
San Francisco, CA 94108

City and County of San Francisco

a municipal corporation, acting by and through the Mayor's Office of Housing and Community Development

By: _____ Date: _____

Daniel Adams
Director, Mayor's Office of Housing and Community Development

Address:

1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103

DRAFT

AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

SCO ID:

 CHECK HERE IF ADDITIONAL PAGES ARE ATTACHED

AGREEMENT NUMBER

21-AHSC-17012

AMENDMENT NUMBER

1. CONTRACTOR'S NAME

BRIDGE Housing Corporation, and 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?

 NO YES (If Yes, enter prior contractor name and agreement number)

PRIOR CONTRACTOR NAME

N/A

PRIOR AGREEMENT NUMBER

N/A

8. BRIEF DESCRIPTION OF SERVICES

Land-use, housing, transportation, and land preservation projects to support infill and compact development that reduce greenhouse gas ("GHG") emissions.

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 AHSC Program, funded from the Greenhouse Gas Reduction Fund, will assist project areas by providing grants and/or loans, or any combination thereof, that will achieve GHG emissions reductions and benefit Disadvantaged Communities through increasing accessibility between destinations resulting in fewer vehicle miles traveled through shortened or reduced trip length or mode shift from Single Occupancy Vehicle use to transit, bicycling or walking.

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	
Greenhouse Gas Reduction Fund	2240 601 3228 Cat.	2021/2022	36	2014	\$ 9,975,082.00	
OBJECT CODE 22402000/45302 = \$253,741.00 5432500 - Grants and Subventions - Non-Governmental					AGREEMENT TOTAL	\$ 9,975,082.00
22402000/45302 = \$9,721,341.00 5432000 - Grants and Subventions - Governmental					AMOUNT ENCUMBERED BY THIS DOCUMENT	\$ 9,975,082.00
OPTIONAL USE					PRIOR AMOUNT ENCUMBERED FOR THIS AGREEMENT	\$ 0.00
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.					TOTAL AMOUNT ENCUMBERED TO DATE	\$ 9,975,082.00

ACCOUNTING OFFICER'S SIGNATURE

ACCOUNTING OFFICER'S NAME (Print or Type)

DATE SIGNED

AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

AGREEMENT NUMBER

21-AHSC-17012

AMENDMENT NUMBER

12. AGREEMENT

AGREEMENT	TERM FROM	TERM THROUGH	TOTAL COST OF THIS TRANSACTION	BID, SOLE SOURCE, EXEMPT
Original		11/30/2042	\$ 9,975,082.00	Exempt
Amendment No. 1				
Amendment No. 2				
Amendment No. 3				
		TOTAL	\$ 9,975,082.00	

13. BIDDING METHOD USED:

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

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.
 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.
 Not Applicable (Interagency / Public Works / Other _____)

17b. EMPLOYEE BARGAINING UNIT NOTIFICATION N/A

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

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

No (Explain Below) Yes _____ % of Agreement

N/A

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

21-AHSC-17012

AMENDMENT NUMBER

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

STANDARD AGREEMENT

STD 213 (Rev. 04/2020)

AGREEMENT NUMBER

21-AHSC-17011

PURCHASING AUTHORITY NUMBER (if applicable)

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

Balboa Lee Avenue, L.P., BRIDGE Housing Corporation, and City and County of San Francisco

2. The term of this Agreement is:

START DATE

Upon HCD Approval

THROUGH END DATE

11/30/2042

3. The maximum amount of this Agreement is:

\$19,610,404.00

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	5
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Exhibit E	Project Specific Provisions and Special Terms and Conditions	6
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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.)

See Attached

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

California Department of General Services Approval (or exemption, if applicable)

Exempt per; SCM Vol. 1 4.04.A.3 (DGS memo dated 06/12/1981)

CONTRACTOR

Balboa Lee Avenue, L.P.

a California limited liability company

By: Balboa Lee Avenue LLC
a California limited liability company

Its: General Partner

By: BRIDGE Housing Corporation
a California nonprofit public benefit corporation

Its: Sole Member/Manager

By: _____ Date: _____

Smitha Seshadri
Executive Vice President

Address:

600 California Street, Suite 900
San Francisco, CA 94108

BRIDGE Housing Corporation

a California nonprofit public benefit corporation

By: _____ Date: _____

Smitha Seshadri
Executive Vice President

Address:

600 California Street, Suite 900
San Francisco, CA 94108

City and County of San Francisco

a municipal corporation, acting by and through the Mayor's Office of Housing and Community Development

By: _____ Date: _____

Daniel Adams
Director, Mayor's Office of Housing and Community Development

Address:

1 South Van Ness Avenue
San Francisco, CA 94103

AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

SCO ID:

 CHECK HERE IF ADDITIONAL PAGES ARE ATTACHED

AGREEMENT NUMBER

21-AHSC-17011

AMENDMENT NUMBER

1. CONTRACTOR'S NAME

Balboa Lee Avenue, L.P., BRIDGE Housing Corporation, and 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?

 NO YES (If Yes, enter prior contractor name and agreement number)

PRIOR CONTRACTOR NAME

N/A

PRIOR AGREEMENT NUMBER

N/A

8. BRIEF DESCRIPTION OF SERVICES

Land-use, housing, transportation, and land preservation projects to support infill and compact development that reduce greenhouse gas ("GHG") emissions.

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 AHSC Program, funded from the Greenhouse Gas Reduction Fund, will assist project areas by providing grants and/or loans, or any combination thereof, that will achieve GHG emissions reductions and benefit Disadvantaged Communities through increasing accessibility between destinations resulting in fewer vehicle miles traveled through shortened or reduced trip length or mode shift from Single Occupancy Vehicle use to transit, bicycling or walking.

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	
Greenhouse Gas Reduction Fund	2240 601 3228 Cat.	2021/2022	36	2014	\$ 19,610,404.00	
OBJECT CODE 22402000/45302 = \$19,610,404.00 5438000 - Loans, Transfers and Other Disbursements					AGREEMENT TOTAL	\$ 19,610,404.00
OPTIONAL USE					AMOUNT ENCUMBERED BY THIS DOCUMENT	
					\$ 19,610,404.00	
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	
					\$ 19,610,404.00	
ACCOUNTING OFFICER'S SIGNATURE			ACCOUNTING OFFICER'S NAME (Print or Type)		DATE SIGNED	

AGREEMENT NUMBER 21-AHSC-17011	AMENDMENT NUMBER
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12. AGREEMENT

AGREEMENT	TERM FROM	TERM THROUGH	TOTAL COST OF THIS TRANSACTION	BID, SOLE SOURCE, EXEMPT
Original		11/30/2042	\$ 19,610,404.00	Exempt
Amendment No. 1				
Amendment No. 2				
Amendment No. 3				
		TOTAL	\$ 19,610,404.00	

13. BIDDING METHOD USED:

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

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.
 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.
 Not Applicable (Interagency / Public Works / Other _____)

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
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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) No (Explain Below) Yes _____ % of Agreement
N/A

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) Contracts Office / Contracts Analyst	DATE SIGNED
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AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

AGREEMENT NUMBER

21-AHSC-17011

AMENDMENT NUMBER

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

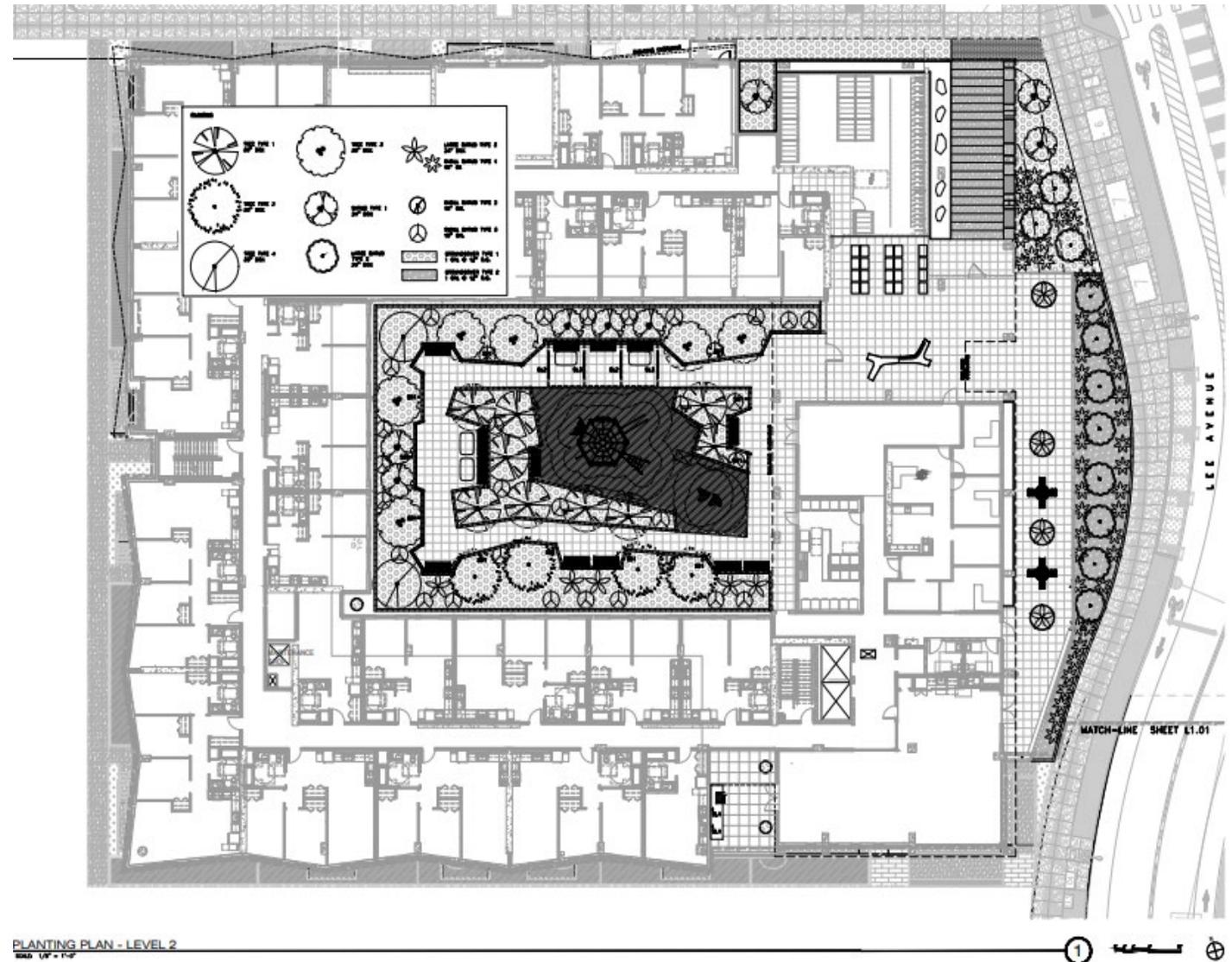
- 2nd 100% affordable development at Balboa Reservoir
- Development Sponsor is BRIDGE Housing
- 158 affordable units, one non-restricted manager's unit (159 total)
- 41 units at 40% AMI, 38 units at 70% AMI, 79 units at 80% AMI

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!

NOFA Round 6 (February 26, 2021)
Funding Application

Revised 4/27/21

2019-20 Cap and Trade Funding



**CALIFORNIA STRATEGIC
GROWTH COUNCIL**



State of California
Governor Gavin Newsom

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

Louise Bedsworth, Executive Director
California Strategic Growth Council

Gustavo Velasquez, Director
Department of Housing and Community Development (HCD)
2020 West El Camino Avenue, Suite 150, Sacramento, CA 95833

email: ahsc@hcd.ca.gov

<http://hcd.ca.gov/grants-funding/active-funding/ahsc.shtml>

Overview

4/27/21

NOTE: This is a Macro-Enabled workbook (*.xism); therefore, macros must be enabled so applicable worksheets, columns and rows become visible. Macros may not work with Microsoft's Excel version for Apple Mac. Please email AppSupport@hcd.ca.gov for assistance. Complete all applicable yellow shaded cells. If you copy data from another source, always paste using "Paste Values". Mouse over cells with red triangles for cell/column instructions.

Affordable Housing & Sustainable Communities Program (AHSC) Project Information

FAAST PIN: 47683

Project Name:	Balboa Reservoir	Project Area Type:	Transit Oriented Development (TOD) - §102(c)	Housing Type:	Rental
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If Project is also known under another Project name(s) or was formerly known under another name(s), enter the name(s): Balboa Reservoir Building E

Have you applied, do you plan to apply, or has the Project been awarded other HCD program funds?

Other HCD Program(s) Name(s):	Funding Amount	Funding Status	NOFA Date	Award Date/Expected Award Date
N/A				

For TOD Area Types - Must include within the Project Area: an Affordable Housing Development and/or Housing Related Infrastructure Project and one other type of eligible capital Project or Program - §102(c)(3) (check all boxes that apply):	<input checked="" type="checkbox"/> Affordable Housing Development (AHD) - §103(a)(1)	Was Project awarded funds in prior AHSC rounds?	No
	<input type="checkbox"/> Housing Related Infrastructure (HRI) - §103(a)(2)	If Yes, which round of AHSC was it awarded?	
	<input checked="" type="checkbox"/> Sustainable Transportation Infrastructure (STI) - §103(a)(3)	Is Project a phase of a previously awarded project?	No
	<input checked="" type="checkbox"/> Transportation-Related Amenities (TRA) - §103(a)(4)	Select Metropolitan Planning Org. or "non-MPO area" below	
	<input checked="" type="checkbox"/> Program Costs (PGM) - §103(b)	Metropolitan Transportation Commission (MTC)	

TOD Project Area Type §102(c)

(1) Includes at least one Transit Station/Stop served by High Quality Transit at time of application submittal?	Yes
(2) Includes an AHD located no farther than one-half mile from a Transit Station/Stop served by High Quality Transit ?	Yes
(3) Includes Capital Projects or Program Costs as indicated in §102(c)(3)?	Yes

ICP Project Area Type §102(d)(1)(2)(3)

(1) Includes at least one Transit Station/Stop ?	
(2) Be served by at least one mode of Qualifying Transit that does not meet the requirements of High Quality Transit at time of application submittal?	
(2) If ICP Project proposes to fund an AHD with AHSC Program funds, will housing be located within one-half mile of a Transit Station/Stop?	
(3) Include Capital Projects or Program Costs as indicated in §102(d)(3)?	

RIPA Project Area Type §102(e)

Located within a Rural Area as defined in H&S §50199.21 and meets all of the requirements in §102(d)?	
(1) Includes at least one Transit Station/Stop ?	
(2) Will be served by at least one mode of Qualifying Transit that does not meet the requirements of High Quality Transit , at time of application submittal?	
(2) If RIPA Project proposes to fund an AHD with AHSC Program funds, will housing be located within a half mile of a Transit Station/Stop?	
(3) Includes Capital Projects or Program Costs as indicated in §102(d)(3)?	

Total Development Costs (TDC) and AHSC Funding - limits: §103(a)(1)(D), §103(a)(2)(B), §103(a)(3)(B), §103(a)(4)(C), §103(b)(2), and §104(a)

Capital Project/Program	TDC	AHSC Funds Request (min \$1M, max \$30M; STI+TRA max \$10M)	AHSC / Total AHSC	Non-AHSC Funding Commitments	Legislative Data
Housing (AHD)	\$106,353,031	\$19,610,404	66.28%	\$85,512,627	State Assembly District: Philip Y Ting - 19
Housing (HRI)	\$0	\$0	0.00%		
Housing (AHD & HRI)	\$106,353,031	\$19,610,404	66.28%	\$85,512,627	Senate District: Scott Weiner - 11
Transportation (STI)	\$9,622,689	\$7,988,935	27.00%	\$1,633,754	Congressional District: Jackie Speier - 14
Transportation (TRA)	\$2,698,140	\$1,732,406	5.86%	\$965,734	
Programs (PGM)	\$253,741	\$253,741	0.86%	\$0	
Totals:	\$118,927,601	\$29,585,486	100.00%	\$88,112,115	

Employment Benefits & Outcomes Reporting §103(a)(1)(C)(iii), (2)(A)(iii), (3)(A)(iii), and (4)(A)(iii)	AHD	HRI	STI	TRA	Total Budgeted	2% Cost Cap	Overage
Total amount of eligible Employment Benefits and Outcomes Reporting costs not to exceed 2% of the total AHSC Program award (not included within the soft costs cap or Active Delivery Cost cap).	\$0	\$0	\$0	\$0	\$0	\$591,710	\$0 OK

Project Description - describe major Project components (do not exceed 700 characters)
 The Balboa Reservoir project is a once in a generation opportunity to redevelop underutilized parking lots in a heavily amenitized High Resource Area into 123 units of mixed income housing that are part of a buildout of roughly 1,100 new units total. The project includes the construction of a new north-south artery for the planned community, as well as the procurement of two new BART vehicles to modernize their fleet. The project creates an alternative pedestrian and cycling network on low traffic streets to encourage biking and walking in the

AB-1550 Priority Populations §101

The Project's priority population benefits will be determined based upon the location of the AHD.							
Project 10 digit census tract:	6075031000	Disadvantaged Community:	N/A	Low-Income Community:	No	Low-Income Households:	Yes
File Name	AB1550	Applicable CARB Priority Population Benefit Criteria Tables.			Uploaded to HCD?	Yes	

Project Area Definition §102(a)

Description of geographical boundaries (defined by vicinity map, service area, etc.): The project area is one of the best locations for any kind of housing in the entire state. 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 AHD lies adjacent to the City College of San Francisco, a major employer in the area.

File Name	Project Area Map	Items marked with (PAM) in this application must be identified on the Project Area Map (PAM). This includes Quantitative Policy Scoring worksheet Active Transportation Improvements §107(b)(1), (4) & (5) and Location Efficiency and Access to Destinations §107(e)(2). Narrative Based Policy worksheet Collaboration & Planning §107(m)(2) must also be identified on the PAM. Refer to the Project Area Mapping Guidance.	Uploaded to HCD?	Yes
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Required Project Area Components §102(a):
 (1) Be a contiguous area included within a distinct planning area in a local or regional planning document(s) or transit service area; Yes

Overview										4/27/21	
(2)	Include at least one Transit Station/Stop consistent with the requirements set forth in the TOD, ICP and RIPA; and									Yes	
(3)	Be of a defined size consistent with one of the following :										
(A)	For Project Areas with fixed transit routes, the defined Project Area may not exceed a one (1) mile buffer around the identified Transit Station/Stop merged with a 1/2 mile buffer around all STI improvements.									Yes	
(B)	For Project Areas with Flexible Transit Service routes, the defined Project Area must be defined based on the identified service area of the transit line.									N/A	
(C)	For Project Areas which include a Transit Corridor, bicycle network or both, Project Area must be identified in a plan (i.e. General, Bicycle Master or Transit Corridor Implementation).									Yes	
Plan name (if applicable): §102(a)(3)(C)											
§106(a)(15)	Applicant acknowledges that Qualifying Transit must be completed and offering service to the Transit Station/Stop of the Project Area by the time set forth in the Standard Agreement.									Yes	
File Name	Transit Service Map	Transit Service Map supporting the Qualifying Transit. Quantitative Policy Scoring worksheet Active Transportation Improvements §107(b)(2) must also be identified on the Map. Refer to the Project Area Mapping Guidance.						Uploaded to HCD?	Yes		
File Name	Transit Service Schedule	All documentation transit service schedule supporting the transit service area. All transit service schedules should be uploaded to "Transit Service Schedule" as one document.						Uploaded to HCD?	Yes		
Application Threshold Requirements §106(a)											
(1)	We certify the Project will achieve a reduction in GHG emissions through fewer vehicle miles traveled (VMT) pursuant to the CARB Quantification Methodology .									Yes	
(2)	We certify that this proposal supports implementation of the applicable Sustainable Community Strategy (SCS) or similar sustainable planning document in non-Metropolitan Planning Organization (MPO) regions and is consistent with activities or strategies identified in the regional SCS, or similar planning document that demonstrate a per capita reduction in VMT and GHG.									Yes	
File Name	MPO Support Document	Document from MPO identified in cell Y9 above confirming consistency with SCS or similar sustainable planning document in non-MPO regions, per §106(a).						Uploaded to HCD?	Yes		
File Name	SCS or Equiv Regional Plan	Indicate the applicable section or elements of the SCS or equivalent regional plan detailing regional government involvement.						Uploaded to HCD?	Yes		
(3)	We certify the Project is consistent with the State planning priorities established pursuant to §65041.1 of the Government Code.									Yes	
(6)(A)	We certify the Project will incorporate at least two Urban Greening feature as defined in Guidelines Appendix A, with dedicated maintenance for at least two years. Select two features below and include costs in budget(s). Note: Applicants must propose at least \$200,000 in reasonable direct Urban Greening costs (must complete all applicable Capital Project budgets).									Yes	
Drought tolerant and native species landscaping and landscape restoration					Urban street canopy						
Urban Greening costs:	AHD:	\$0	HRI:	\$0	STI:	\$975,660	TRA:	\$0	Total Urban Greening costs	\$975,660	
(6)(B)	We certify the Project will include adequate lighting in accordance with local, state, and federal design standards and requirements for all publicly accessible components of the Project including active transportation routes and transit stations or stops.									Yes	
(7)	Must demonstrate a level of committed funding at time of application that is ≥ 0.90			§106(a)(7) calculation:			0.99	If No, Project has insufficient funding Commitments			
(10)	Is application sufficiently complete to assess feasibility of application and its compliance with AHSC Program and application requirements?									Yes	
(16)	Does any Capital Project trigger State Reloc. Assistance Law (CA Gov Code §7260-7277)?			AHD	No	HRI	No	STI	No	TRA	No
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 AHD is being built on a parcel that is vacant and cleared, as shown in the satellite image uploaded as "Reloc Plan"									
File Name	Reloc Plan	Applicants must provide a Relocation Plan or documentation supporting no relocation.						Uploaded to HCD?	Yes		
(17)	Will the Housing Element for the jurisdiction in which Project is located be in substantial compliance by the date of award recommendation. Housing Element in substantial compliance means the local public entity's adopted housing element is in substantial compliance as demonstrated by a letter from HCD which sets forth findings that the housing element adopted within the time frames required by Gov Code §65588 includes that substance essential to every requirement of Article 10.6, commencing with Gov. Code §65580, Ch. 3 of Div. I of Title VII? Projects located on Trust Land, as defined in Appendix B(a)(1), (2), are exempt from this requirement.									Yes	
File Name	Hsng Element Letter	A jurisdiction's current housing element status is obtainable thru HCD's website						Uploaded to HCD?	Yes		
(18)	Climate adaptation measures are integrated into Project through the "Community Climate Resiliency" scoring in §107(m) - Narrative-Based Policy worksheet									Yes	
(23)	All Project components will meet applicable codes, including the California Building Standards Code (CCR, Title 24), which effective January 1, 2020, requires mechanical ventilation systems with high efficiency filtration of Minimum Efficiency Rating Value (MERV) 13.									Yes	
(25)	Project will meet the accessibility requirements specified in the TCAC regulations, as may be amended and renumbered from time to time. Exemption requests, as provided for in the TCAC regulations, must be approved in writing by HCD prior to the start of construction. Projects must also provide a preference for accessible units to persons with disabilities requiring the features of the accessible units in accordance with TCAC regulations. The applicant or Developer of the Project must ensure that any other applicable federal, state, and local accessibility requirements are met.									Yes	
(26)	Projects involving new construction, acquisition and Substantial Rehabilitation, or conversion of nonresidential structures to residential dwelling units will be capable of accommodating broadband service with at least a speed of 25 megabits per second for downloading and 3 megabits per second for uploading (25/3)?									Yes	
Applicant Information §105											
File Name	Indian Tribe	If applicable, for all Federally recognized Indian Tribe Applicants, upload documentation to support requirements as described in Appendix B.						Uploaded to HCD?	N/A		
Will a Public Agency have a real property interest in the proposed Project §105(a)(3)? (If Yes, your application must include one of the following below)										Yes	
1. Application will include the Public Agency as a joint applicant											
File Name	STI TRA Agrmnt	If applicable, an applicant may provide an executed agreement with a specific Locality or transportation agency non-applicant for the completion of STI or TRA components for which funding is sought.						Uploaded to HCD?	Yes		
AHD Developer	Will the AHD Developer be an applicant? Yes Identify the required Developer attachments below as App1.										
Developer name	BRIDGE Housing Corporation			Eligibility	AHD Developer	Organization type	Non-profit Corporation				
Address	600 California St, Suite 900			City	San Francisco	State	CA	Zip	94108		
Auth Rep	Smitha Seshadri		Title	Senior Vice President		Email	sseshadri@bridgehousing.com		Phone	415-989-1111	
Contact	Brad Wiblin		Title	Executive Vice President		Email	bwiblin@bridgehousing.com		Phone	415-321-3565	
Address	600 California St, Suite 900			City	San Francisco	State	CA	Zip	94108		
File Name	App1 Cert & Legal	See Certifications & 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?	Yes		

Overview

4/27/21

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?	Yes
File Name	App1 FISCAL TIN Form	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
File Name	App1 Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	Yes
File Name	App1 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	Yes

Applicant #2				
Entity name	City and County of San Francisco		Eligibility	Locality
Address	1 S Van Ness Ave		City	San Francisco
			State	CA
			Zip	94103
Auth Rep	Eric Shaw	Title	Director	Email
				eric.shaw@sfgov.org
				Phone
				415-701-5500
Contact	Sara Amaral	Title	Senior Project Manager	Email
				sara.amaral@sfgov.org
				Phone
				415-701-5523
Address	1 S Van Ness Ave		City	San Francisco
			State	CA
			Zip	94103

File Name	App2 Cert & Legal	See Certifications & Legal worksheet.	Uploaded to HCD?	Yes
File Name	App2 Resolution	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	Yes
File Name	App2 OrgDoc1, OrgDoc2, etc...	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
File Name	App2 OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
File Name	App2 Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
File Name	App2 Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
File Name	App2 FISCAL TIN Form	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
File Name	App2 Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	Yes
File Name	App2 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	Yes

Applicant #3 (if applicable)				
Entity name	Eligibility		Organization type	
Address	City		State	Zip
Auth Rep	Title	Email	Phone	
Contact	Title	Email	Phone	
Address	City		State	Zip

File Name	App3 Cert & Legal	See Certifications & Legal worksheet.	Uploaded to HCD?	
File Name	App3 Resolution	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App3 OrgDoc1, OrgDoc2, etc...	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App3 OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App3 Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App3 Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App3 FISCAL TIN Form	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App3 Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	
File Name	App3 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	

Applicant #4 (if applicable)				
Entity name	Eligibility		Organization type	
Address	City		State	Zip
Auth Rep	Title	Email	Phone	
Contact	Title	Email	Phone	
Address	City		State	Zip

File Name	App4 Cert & Legal	See Certifications & Legal worksheet.	Uploaded to HCD?	
File Name	App4 Resolution	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App4 OrgDoc1, OrgDoc2, etc...	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App4 OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App4 Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App4 Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App4 FISCAL TIN Form	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App4 Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	
File Name	App4 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	

Applicant #5 (if applicable)				
Entity name	Eligibility		Organization type	
Address	City		State	Zip
Auth Rep	Title	Email	Phone	
Contact	Title	Email	Phone	
Address	City		State	Zip

File Name	App5 Cert & Legal	See Certifications & Legal worksheet.	Uploaded to HCD?	
File Name	App5 Resolution	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App5 OrgDoc1, OrgDoc2, etc...	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App5 OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App5 Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App5 Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App5 FISCAL TIN Form	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	App5 Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	
File Name	App5 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	

Development Team Contacts (provide information that is currently available)

Owner/Borrower Entity				
Legal name	BHC Balboa Builders, LLC		Organization type	Limited Liability Company
Address	600 California St, Suite 900		City	San Francisco
			State	CA
			Zip	94108
Auth Rep	Brad Wiblin	Title	Vice President	Email
				bwiblin@bridgehousing.com
				Phone
				415-321-3565
Contact	Brad Wiblin	Title	Vice President	Email
				bwiblin@bridgehousing.com
				Phone
				415-321-3565
Address	600 California St, Suite 900		City	San Francisco
			State	CA
			Zip	94108
File Name	Owner Cert & Legal	See Certifications & Legal worksheet.	Uploaded to HCD?	Yes

Overview					4/27/21
File Name	Owner Resolution	Signature required; see Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	Owner OrgDoc1, OrgDoc2, etc...	See Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	Owner OrgChart	See Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	Owner Signature Block	See Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	Owner Payee Data Record	See Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	Owner FISCAL TIN Form	See Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	Owner Cert of Good Standing	Dated 30 days or less from the application due date.		Uploaded to HCD?	Yes
File Name	Owner Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.		Uploaded to HCD?	Yes
In the cell below, select an applicable controlling party to the organization type in cell AE166					
Controlling party #1 title AGP					
Legal Name Reservoir Community Partners LLC			Organization Type Limited Liability Company		
Address 671 N. Glebe Road, Suite 800			City Arlington	State VA	Zip 22203
Auth Rep Brad Wiblin		Title Vice President	Authorized Rep. Email bwiblin@bridgehousing.com		Phone 415-321-3565
Contact Brad Wiblin		Title Vice President	Contact Email bwiblin@bridgehousing.com		Phone 415-321-3565
Address 600 California St, Suite 900			City San Francisco	State CA	Zip 94108
File Name	AGP Cert & Legal	See Certifications & Legal worksheet.		Uploaded to HCD?	Yes
File Name	AGP Reso	Signature required; see Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	AGP OrgDoc1, OrgDoc2, etc	See Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	AGP OrgChart	See Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	AGP Signature Block	See Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	AGP Payee Data Record	See Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	AGP TIN	See Applicant Documents worksheet.		Uploaded to HCD?	Yes
File Name	AGP Cert of Good Standing	Dated 30 days or less from the application due date.		Uploaded to HCD?	Yes
File Name	AGP Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.		Uploaded to HCD?	Yes
In the cell below, select an applicable controlling party to the organization type in cell AE166					
Controlling party #2 title					
Legal Name			Organization Type		
Address			City	State	Zip
Auth Rep		Title	Authorized Rep. Email		Phone
Contact		Title	Contact Email		Phone
Address			City	State	Zip
File Name	Cert & Legal	See Certifications & Legal worksheet.		Uploaded to HCD?	
File Name	Reso	Signature required; see Applicant Documents worksheet.		Uploaded to HCD?	
File Name	OrgDoc1, OrgDoc2, etc	See Applicant Documents worksheet.		Uploaded to HCD?	
File Name	OrgChart	See Applicant Documents worksheet.		Uploaded to HCD?	
File Name	Signature Block	See Applicant Documents worksheet.		Uploaded to HCD?	
File Name	Payee Data Record	See Applicant Documents worksheet.		Uploaded to HCD?	
File Name	TIN	See Applicant Documents worksheet.		Uploaded to HCD?	
File Name	Cert of Good Standing	Dated 30 days or less from the application due date.		Uploaded to HCD?	
File Name	Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.		Uploaded to HCD?	
In the cell below, select an applicable controlling party to the organization type in cell AE166					
Controlling party #3 title					
Legal Name			Organization Type		
Address			City	State	Zip
Auth Rep		Title	Authorized Rep. Email		Phone
Contact		Title	Contact Email		Phone
Address			City	State	Zip
File Name	Cert & Legal	See Certifications & Legal worksheet.		Uploaded to HCD?	
File Name	Reso	Signature required; see Applicant Documents worksheet.		Uploaded to HCD?	
File Name	OrgDoc1, OrgDoc2, etc	See Applicant Documents worksheet.		Uploaded to HCD?	
File Name	OrgChart	See Applicant Documents worksheet.		Uploaded to HCD?	

Overview

4/27/21

File Name	Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	TIN	See Applicant Documents worksheet.	Uploaded to HCD?	
File Name	Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	
File Name	Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	

Transit Agency Partner (applicable to STI and TRA components)

Legal name	San Francisco Bay Area Rapid Transit District	Contact	Shannon Dodge	Email	
Phone	(510) 359-6978	Address	2150 Webster St., 9th floor	City	Oakland
				State	CA
				Zip	94612

Property Management Agent

Legal name	BRIDGE Property Management Company	Contact	James Valva	Email	
Phone	415.989.1111	Address	600 California Street, Suite 900	City	San Francisco
				State	CA
				Zip	94108

Financial Consultant

Legal name	California Housing Partnership	Contact	Chad Horsford	Email	
Phone	(424) 294-8483	Address	600 Wilshire Blvd, Suite 890	City	Los Angeles
				State	CA
				Zip	90017

Primary Service Provider

Legal name	TBD	Contact		Email	
Phone		Address		City	
				State	
				Zip	

Borrower Legal Counsel

Legal name	Lubin Olson & Niewiadomski LLP	Contact	Beth Anderson	Email	
Phone	(415) 981-0550	Address	600 Montgomery Street, 14th Floor	City	San Francisco
				State	CA
				Zip	94111

General Contractor

Legal name	TBD	Contact		Email	
Phone		Address		City	
				State	
				Zip	

Architect

Legal name	Van Meter Williams Pollack LLP	Contact	Karen Murray	Email	
Phone	415.974.5352 x 207	Address	333 Bryant Street #300	City	San Francisco
				State	CA
				Zip	94107

Development Funding Source

Legal name	Chase	Contact	Douglas Leezer	Email	
Phone	858 812 2448	Address	4250 Executive Square, Suite 825	City	La Jolla, CA
				State	CA
				Zip	92037

Development Funding Source

Legal name	Reservoir Community Partners	Contact	Joe Kirchofer	Email	
Phone	(628) 267-2701	Address	455 Market Street Suite 1650	City	San Francisco
				State	CA
				Zip	94105

Development Funding Source

Legal name	Mayor's Office of Housing and Community Development City and County of San Francisco	Contact	Sara Amaral	Email	
Phone	(415) 701-5614	Address	1 South Van Ness Avenue, 5th Floor	City	San Francisco
				State	CA
				Zip	94103

Development Funding Source

Legal name	N/A	Contact		Email	
Phone		Address		City	
				State	
				Zip	

Development Funding Source

Legal name	N/A	Contact		Email	
Phone		Address		City	
				State	
				Zip	

Rent/Operating Subsidy Source

Legal name	N/A	Contact		Email	
Phone		Address		City	
				State	
				Zip	

Rent/Operating Subsidy Source

Legal name	N/A	Contact		Email	
Phone		Address		City	
				State	
				Zip	

Required Applicant Documentation

4/27/21

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 AHSC 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 AHSC website.](#)

Certification & Legal Disclosure

4/27/21

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):

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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 <i>past ten years</i> ?	No
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?	No
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?	No
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?	No
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?	No

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?	No
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?	No
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?	No
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?	No
10. Within the past ten years, has the applicant been convicted of any felony?	No
11. Within the past ten years, has the applicant been convicted of any misdemeanor related to the conduct of the applicant's business?	No
12. Within the past ten years, has the applicant been convicted of any misdemeanor for any financial or fraud related crime?	No

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?	N/A
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Printed Name	Title of Signatory	Signature	Date

1) Sponsor/Developer Experience

Founded in 1983 and headquartered in San Francisco, BRIDGE Housing Corporation is the largest developer of affordable and workforce housing on the West Coast. BRIDGE Housing Corporation is a 501(c)3 nonprofit corporation. BRIDGE has participated in the development of over 19,000 housing units and over 600,000 square feet of retail/commercial space in well over 100 properties valued at more than \$3 billion. BRIDGE pursues the goal of "quality, quantity and affordability" while meeting the growing demand for affordable housing in high-cost communities. As a mission-driven nonprofit, we pay close attention to the double-bottom line of financial and social return on investment, always in pursuit of quality, quantity, affordability. BRIDGE has also received more than 180 local, national and international awards, including five ULI Global Awards for Excellence. BRIDGE has deep expertise developing workforce and mixed income housing. Our projects are often catalysts for continued development and bring enhanced vibrancy to evolving neighborhoods. BRIDGE specializes in creating homes where people can thrive economically and socially.

2) Topography and Special Site Features

The site design reinterprets the sculptural qualities of the existing industrial topography and the unique coastal environment and aims to re-establish the natural grade to unify the site with the surrounding neighborhoods. The design uses the topography to express the site hydrology; creates accessible connections to public streets and open spaces to encourage access and use; and emphasizes low-impact development strategies to reduce the burden on the City's combined stormwater and sewer system.

3) Proposed Tenant Poplulation

Families between 30 and 80% AMI.

4) Specific Issues (relocation, environmental, historical, etc.)

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

5) Demolition, if applicable

Not applicable.

6) Rehabilitation, if applicable

Not applicable.

7) Will Prevailing Wage be paid

Yes prevailing wage will be paid.

Balboa Reservoir AHD and HRI Overview PIN 47683

4/27/21

Affordable Housing Development (AHD) and Housing Related Infrastructure (HRI) Project Summary

Project Name	Description (include: descriptive information such as on-site resident or community amenities, climate adaptive features, and resources in the immediate vicinity)	Address	City	Zip	County	Lat.	Log	Census Tracts	APNs
AHD	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 (AMI) or below. 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 individuals and families will have access to a range of on-site and off-	11 Frida Kahlo Way, San Francisco, CA 94112	San Francisco	94112	San Francisco	37.72627	-122.454094	6075031000	Block 3180/Lot 190
HRI									

AHD Information:		Area	Unit Count	Building Count	Elevator Count	Density Project Type		
Land Area	Acre	0.70	Units/Acre 177	# of Bldgs 1	# of Elevators 2	Mixed Use Project		
Residential Rental	sq. ft.	137,150	# of Units 124	# of Bldgs 1	# of Elevators 2			
Homeownership	sq. ft.	0	# of Units 0	# of Bldgs	# of Elevators			
Commercial	sq. ft.	0	# of Units/Spaces	# of Bldgs	# of Elevators			
Residential Non-Rental	sq. ft.	930	# of Units/Spaces	# of Bldgs	# of Elevators			
Other (Public)	sq. ft.	2,100	# of Units/Spaces	# of Bldgs	# of Elevators	Multiple Parcels		
Number of car share parking spaces		0	Number of electric vehicle charging parking spaces		0	Number of uncovered guest parking spaces		0
# of car parking spaces		0	Parking ratio: car spaces/total units		0:1	Total # of bicycle parking spaces		62
			Parking ratio: bicycle spaces/total units					1:2
Is the AHD a scattered site project? §103(a)(1)(B)(ii) <input type="checkbox"/> No								

AHD Capital Projects §103(a)(1)	
(A)(i) Select from the dropdown menu one or more of the following qualified AHD development types related to your Project	New construction <input type="checkbox"/> Ok

(A)(ii) The AHD must be located within a half mile from a Transit Station/Stop that meets Project Area transit requirements per §102(c) or (d).	AHD distance from Transit Station/Stop	0.2	Miles	Ok
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(A)(iii) Must include at least 20% of the total residential units as Affordable Units (must complete "Max Funds & Unit Mix" worksheet). Ok

(A)(iii) Must have an overall average affordability of all Project's Restricted Units of no greater than 50% represented by AMI (must complete "Max Funds & Unit Mix" worksheet). Yes

Extremely Low Income (ELI) 15-30% AMI units 26 Very Low Income (VLI) 31-50% AMI units 14 (iii) % Affordable units 70% Affordability: Rental 49% HO 0%

(A)(iv)(a) Must meet minimum Net Density requirements upon completion of the AHD. Ok

Total Sites Area in Square Feet	Total Buildings Floor Area in Sq. Feet	(iv) Calculated Floor Area:	Ok	5.75
(Less Qualified* Square Feet Deductions):	(Less Excluded Areas in Square Feet):	(iv) Calculated Net Density: Ok		
Dedicated streets	Mechanical Space	*NOTE: The following are NOT qualified as site deductions: Utility Easements, Off-street parking, setbacks, private drives and walkways, Landscaping, Common Areas and Facilities, Drainage Facilities (exclusive to a development) and Other mitigation space required for development.		
Sidewalks	Cellar space			
Parks	Floor space in open balconies			
Open Space	Enclosed parking			
Other	Elevator or stair bulkheads			
Net Site Area-acres	Net Building Square Feet			
0.52	131,230			

File Name	Net Density Verification	Letter and sealed site map certified by a California State-licensed professional (e.g., an engineer, surveyor, or landscape architect) confirming the net density.	Uploaded to HCD?	Yes
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(A)(iv)(b) - Only applicable to Acquisition and Substantial Rehabilitation Projects N/A If cell at left is "Yes" meaning AHD results in less units or lower affordability %, are reductions to meet building code requirements? N/A

Prior to rehab - existing # of units AHD Project units 124 Prior to rehab - percentage of total affordable AHD percentage of total affordability 70%

(A)(v) Must supply one Secure Overnight Bicycle Parking Spots per every two units (describe below, Secure Overnight Bicycle Parking proposed including a description of how bicycles are secured (i.e., bike locker, bike building, etc.) # of Secure Overnight Bicycle Parking spots at AHD 62 Ok

The project will contain 62 secure overnight bicycle parking spots in a completely enclosed area that is accessible to residents only. The bicycle parking will protect the bicycles from inclement weather. The racks will allow for the bicycle frame to be secured to the bicycle rack at two points

(E) Does your AHD Capital Project include multiple AHDs with an AHD receiving 4% low-income housing tax credits, and another receiving 9% low-income housing tax credits? No If Yes, this constitutes two separate and independent projects, each of which must submit an entirely separate HCD application and qualify independently of the other.

AHD Project Amenities			
Number of laundry rooms	7	Gated site entry	No
Fitness room	No	Building card key	Yes
Swimming pool	No	Security patrol	No
Jacuzzi/Sauna	No	Security cameras	Yes
Community room	Yes	Picnic/BBQ area	No
Community kitchen	Yes	Tot lot or playground	No
Computer room	No	Sports/tennis court	No
High speed internet	No	Other amenity :	No

AHD Unit Amenities			
Air conditioning	No	Disposal	Yes
Refrigerator	Yes	Dishwasher	Yes
Range	Yes	Washer	No
Microwave	No	Dryer	No
Walk-in closet	No	Free cable TV	No
Curtains/Blinds	No	Lofts	No
Fireplace	No	Balcony	No
Emergency Call	No	Patio	No

AHD Eligible Costs §103(a)(1)(C) and Ineligible Costs §103(c)			
§103(a)(1)(C)(ii) The total amount of eligible AHD soft costs cannot exceed 10% of the total AHSC Program award.	Budgeted	Cost Cap	Overage
	\$0	\$2,958,549	\$0

Balboa Reservoir AHD and HRI Overview PIN 47683										4/27/21		
§103(c) We certify the AHSC AHD funded cost do not include any of the following ineligible costs: (1) Costs are not eligible if there is another feasible, available source of committed funding for the STI portion thereof to be funded by AHSC or if the cost is incurred prior to the AHSC award; (2) Routine maintenance or operations of transportation infrastructure (including transit fleet, not including AHSC funded transit service expansion); (3) In lieu fees for local inclusionary housing programs; (4) Ongoing operational costs beyond the term of the grant (three years) for Program Costs; and (5) All costs associated with automobile or motorcycle parking (excluding electric vehicle charging infrastructure).											Yes	
HRI Eligible Costs §103(a)(2)(A) and Ineligible Costs §103(c)												
(i) Are capital improvements in the HRI budget required by a locality, transit agency, or special district? <input type="checkbox"/> If Yes, are improvements a condition to the approval of the AHD? <input type="checkbox"/>												
File Name	Cap Improvements Req	Documentation from a Locality, transit agency or special district that capital improvements are required						Uploaded to HCD?	N/A			
							Budgeted	Cost Cap	Overage			
(ii) Total amount of eligible HRI soft costs cannot exceed 10% of the total AHSC Program award.							\$0	\$2,958,549	\$0	Ok		
(iv) Total amount of eligible environmental remediation costs cannot exceed 50% of the total AHSC HRI grant funds.							\$0	\$0	\$0	Ok		
(v) Total amount of eligible real property acquisition of the HRI Project site and associated fees cannot exceed 10% of the total AHSC Program award.							\$0	\$2,958,549	\$0	Ok		
(vi) Total amount of eligible impact fees cannot exceed 15% of the total AHSC Program award up to \$300,000.							\$0	\$300,000	\$0	Ok		
§103(c) We certify the AHSC HRI funded cost do not include any of the following ineligible costs: (1) Costs are not eligible if there is another feasible, available source of committed funding for the STI portion thereof to be funded by AHSC or if the cost is incurred prior to the AHSC award; (2) Routine maintenance or operations of transportation infrastructure (including transit fleet, not including AHSC funded transit service expansion); (3) In lieu fees for local inclusionary housing programs; (4) Ongoing operational costs beyond the term of the grant (three years) for Program Costs; and (5) All costs associated with automobile or motorcycle parking (excluding electric vehicle charging infrastructure).											Yes	
HRI Grant Terms §104(c)												
(1) We certify the HRI grant does not result in a profit that exceeds the commercially reasonable range for other improvements of similar size and level of risk.												
(2) We acknowledge that HRI grant funds will be disbursed as reimbursed progress payments for eligible costs incurred after the execution of the Standard Agreement in the amount not to exceed the AHSC Program award of funds.												
(3) We acknowledge if the HRI Project includes multiple phases or developments, all entitlements and construction funding commitments for the first phase must be received prior to disbursement.												
(4)(b) We acknowledge conditions precedent to the first disbursement of HRI funds shall include receipt of all required public agency entitlements and all construction funding commitments for the AHD supported by the HRI.												
AHD Threshold §106(a)												
(4) Describe how AHD provides free transit passes, reloadable transit cards or discounted passes priced at no more than half of retail cost.												
Each restricted unit will be provided with one (1) discounted pass priced at no more than half of retail cost, for at least three years. Each card or pass will have a minimum value of 40 average commute length rides a month as determined by the transit agency.												
Number of passes or cards that will be provided: <input type="text" value="87"/> Is there at least one pass per restricted unit? <input type="checkbox"/> Yes <input type="checkbox"/> No Type of transit passes provided: <input type="text" value="Discounted Pass"/>												
(5) Applicant certifies the proposed AHD will be smoke free and demonstrate compliance prior to construction loan closing.											Yes	
File Name	SFH Lease Addendum	§106(a)(5) Smoke Free Housing Lease Addendum, must be submitted prior to construction close.						Uploaded to HCD?	N/A			
(8) For the AHD, can you provide documentation of completion and approval or adoption of all necessary environmental clearances including those required under the CEQA and if applicable, NEPA, and all applicable time periods for filing appeals or lawsuits have lapsed within 30 days of the application due date with lawsuits or appeals filed?											Yes	
NEPA:	Is Federal funding proposed that will trigger NEPA requirements?						<input type="checkbox"/> No <input type="checkbox"/> Yes	If Yes, enter date of "Authority to Use Grant Funds"				
CEQA:	Project approved "by-right"? <input type="checkbox"/> No <input type="checkbox"/> Yes		Is Project Categorically Exempt? <input type="checkbox"/> No <input type="checkbox"/> Yes		Negative Declaration date		N/A	Final EIR date <input type="text" value="5/28/20"/>				
Discuss below any special NEPA and/or CEQA Special Circumstances or exemptions and provide estimated/actual completion dates of all necessary environmental clearances.												
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												
File Name	AHD Environmental	Copy of all environmental clearances (e.g. Environmental Impact Report) or Notice of Exemption.						Uploaded to HCD?	Yes			
File Name	AHD Auth to Use Grant Funds	For NEPA only, 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			
(9) Have all necessary discretionary local land use approvals been granted? (if entitlements from the local jurisdiction can be secured/submitted within 30 calendar days after application due date, select "Within 30 days" if this applies to any approvals). Applicants must provide a listing and status of applicable discretionary local land use entitlements and permits required to complete the AHD Project that have been granted, submitted or to be applied for to local agencies, or consistent with local planning docs.											Yes	
Agency / Issuer		Land Use Approval Date		Approval Type		Comments						
San Francisco Planning Commission		5/28/20		Other		Certification of the Final EIR						
Board of Supervisors - City of San Francisco		8/18/20		Development Plan Approval		Approved a General Plan Amendment, Planning Code and Zoning map Amendments, and a Development Agreement.						
(10) Does the Market study demonstrate the AHD Project is financially feasible? A study that meets requirements specified in TCAC Regs §10322(h)(10) will be accepted by HCD.											Yes	
File Name	AHD Market Study	Provide a completed market study prepared within one year of the application due date.						Uploaded to HCD?	Yes			
(11) Does applicant or Developer of Project have Site Control for AHD Project? If yes, enter site control form and the most recent execution date below (See Site Control Appendix A)											Yes	
Form of site control (See Site Control in Appendix A)				Enforceable Option to Lease or Purchase				Most recent document execution date				2/18/21
If leasehold estate:		Rent based on restricted land value?		N/A		Is acquisition cost \$0 in AHD Dev.		N/A		Prepaid lease loan used? If so answer (a-c)		N/A
(a) Funding amount based on the Present Value of lease payments?		N/A		(b) Lender requesting Residual Receipts (not permissible)		N/A		(c) Has loan amount been entered as a finance cost?		N/A		
Describe any special site-control circumstances.												
N/A												
File Name	AHD Site Control	Appropriate documentation to demonstrate the form of site control indicated above.						Uploaded to HCD?	Yes			
File Name	AHD Preliminary Title Report	PTR, that is no more than 6 months old for the AHD Project.						Uploaded to HCD?	Yes			
(12) Applicant (BRIDGE Housing Corporation) must demonstrate prior experience by providing evidence of two prior AHD projects similar to the proposed AHSC Project in scope and size, which have been completed by the applicant during the ten years preceding the application due date.												
(12) Which applicant demonstrates the prior experience noted below: BRIDGE Housing Corporation												
AHD Past Project #1					AHD Past Project #2							
Project Name	Celadon at 9th and Broadway				COMM22							
Development Entity	Broadway Upper Tower Associates, L.P. Broadway Tower Associates, L.P.				COMM22 Family Housing, L.P. COMM22 Senior Housing, L.P.							
Completion Date	4/30/15				Family - 12/31/14							
Project Tenure	4 years				5 years							

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Number of units	250		200	
Units per Acre	438.5964912		50	
Commercial (square feet)	approx. 5,200 sq. ft.		approx. 21,850 sq. ft. of commercial/childcare/clinic	
Brief Description (e.g. number of units, population served, etc.)	Celadon is an 18-story high-rise containing 250 affordable housing units ground floor commercial spaces and parking. Of Celadon's 250 units, 25 are reserved for youth aging out of foster care and adults under the Mental Health Services Act (MHSA) program and 63 apartments serve frail seniors under the Program of All-Inclusive Care for the Elderly (PACE). Residents have access to a community room, laundry facilities and numerous outdoor spaces, including a resident garden. The property also features a supportive services office and meeting room. Celadon achieved LEED Gold Certification and has an eco-roof		COMM22 is a master planned community on 4 acres of land that includes 200 units of affordable rental family and senior housing, 15,000 SF of commercial space, and a 4,500 SF child care center. The development is comprised of 2 projects: Victoria at COMM22 is a 70 unit affordable senior development with a ground floor lobby, community room and library room, large outdoor courtyard and fireplace, as well as a laundry room on each floor. The project also includes a 4,500 sf ground floor childcare facility. Paseo at COMM22 houses 130 low-income households and includes a 2,350 SF community medical clinic and a 10,500 SF	
File Name	Past Exp AHD1, Past Exp AHD2	Certificates of Occupancy for two recently completed affordable housing developments.	Uploaded to HCD?	Yes
(13) We certify as of the application date, the applicants or the AHD real property is not party to or the subject of any claim or action in the state or federal courts.				Yes
(14) We certify that construction of the AHD Project has not commenced as of the application deadline set forth in the NOFA.				Yes
(19) The AHD will not result in the loss or conversion of agricultural or other working lands, or natural resource lands for other uses according to the Dept. of Conservation's Farmland Mapping and Monitoring Program (FMMP) website?				Yes
If "Yes", provide documentation the AHD site is not within land designated as agricultural land per the FMMP tool.				
File Name	AHD No Ag	Demonstrate the AHD site is not within land designated as agricultural land per FMMP tool.	Uploaded to HCD?	Yes
If "No", demonstrate that the AHD Project site qualifies as an Infill Site (as defined in Appendix A):				
File Name	AHD Ag Infill	Applicants seeking an exemption to the FMMP determination must demonstrate that the AHD Project site qualifies as an Infill Site (as defined in Appendix A).	Uploaded to HCD?	N/A
(20)(A) We certify the AHD meets the underwriting standards in Uniform Multifamily Regulations §8300 - §8316 and Multifamily Housing Program Guidelines §7312.				Yes
(20)(B) We certify the AHD is infeasible without AHSC Program funds, and other committed funds are not and will not be supplanted by AHSC Program funds.				Yes
(20)(C) If the AHD involves new construction or Substantial Rehabilitation and requires the demolition of existing residential units, it is only eligible if the number of bedrooms in the new Project is at least equal to the number of bedrooms in the demolished structures, with equal or greater affordability. The new affordable units may exist on separate parcels provided all parcels are part of the same Project meeting the requirements of UMR 8303(b).				
New Construction or Substantial Rehabilitation Project: is demolition of existing residential required (only eligible if the number of bedrooms in the new Project is at least equal to the total number of bedrooms in the demolished structures)?		No		
(20)(D) If the AHD and/or HRI involves the demolition of existing units that are affordable to lower-income households, the application must demonstrate the replacement of demolished units, comparable in size, of equal or greater affordability and equal to or greater than the number of the demolished affordable units located within comparable access to transit and include first right of return to displaced residents. Explain below how this requirement is satisfied. If not applicable, indicate "N/A" below.				
N/A				
(20)(E) We certify the proposed AHD is consistent with State and Federal Fair Housing requirements including duties to affirmatively further fair housing (explain below).				Yes
The proposed AHD will fully support the principles of the Fair Housing Act by prohibiting discrimination in the rental of dwellings, and other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including children under the age of 18 living with parents or legal custodians, pregnant women, and people securing custody of children under the				
HRI Threshold §106(a) (if applying for AHSC HRI funding)				
(8) For the HRI, can you provide documentation of completion and approval or adoption of all necessary environmental clearances including those required under the CEQA and if applicable, NEPA, and all applicable time periods for filing appeals or lawsuits have lapsed within 30 days of the application due date with lawsuits or appeals filed?				
NEPA:	Is Federal funding proposed that will trigger NEPA requirements?		If Yes, enter date of "Authority to Use Grant Funds"	
CEQA:	Project approved "by-right"?	Is Project Categorically Exempt?	Negative Declaration date	Final EIR date
Discuss below any special NEPA and/or CEQA Special Circumstances or exemptions and provide estimated/actual completion dates of all necessary environmental clearances.				
File Name	HRI Environmental	Copy of all environmental reports and clearances (e.g. EIR, Phase 1 Notice of Exemption).	Uploaded to HCD?	N/A
File Name	HRI Auth to Use Grant Funds	For NEPA only, 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?	N/A
(9) If applicable, provide a listing and status of all discretionary local land use entitlements and permits, excluding design review, required to complete the HRI Project that have been granted, submitted or to be applied for to the appropriate local agencies, or consistent with local planning documents.				
Agency / Issuer	Land Use Approval Date	Approval Type	Comments	
(10) Does the Market study demonstrate Project is financially feasible (HRI requires a market study only if not using AHSC funds for AHD)? A market study that meets the requirements specified in TCAC Regs §10322(h)(10) will be accepted by HCD.				
File Name	HRI Market Study	Completed market study prepared within one year of the application due date.	Uploaded to HCD?	N/A
(11) Does applicant or Developer of Project have Site Control for HRI Project? If yes, enter site control form and the most recent execution date below (See Site Control Appendix A)				
Form of site control (See Site Control in Appendix A)		Most recent document execution date		
If leasehold estate:	Rent based on restricted land value?	Is acquisition cost \$0 in Dev. Budget?	Prepaid lease loan used? If so answer (a-c)	
(a) Funding amount based on the Present Value of lease payments?		(b) Lender requesting Res. Receipts (not permissible)	(c) Has loan amount been entered as a finance cost?	
Describe any special site control circumstances.				
File Name	HRI Site Control	Appropriate documentation to demonstrate the form of site control indicated above.	Uploaded to HCD?	N/A
(12) Applicants must demonstrate prior experience by providing evidence of two prior HRI projects similar to the proposed AHSC Project in scope and size, which have been completed by the applicant during the ten years preceding the application due date.				
(12) Which applicant demonstrates the prior experience noted below:				
	HRI Past Project #1		HRI Past Project #2	
Project Name				
Development Entity				
Completion Date				
Project Tenure				
Number of units				

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Units per Acre				
Commercial (square feet)				
Brief Description (e.g. number of units, population served, etc.)				
File Name	Past Exp HRI1, Past Exp HRI2	Certificates of Occupancy for two recently completed affordable housing developments.	Uploaded to HCD?	N/A
(13) We certify as of the application date, the applicants or the HRI real property is not party to or the subject of any claim or action in the state or federal courts.				
(14) We certify that construction of the HRI Project has not commenced as of the application deadline set forth in the NOFA.				
(19) The HRI Project will not result in the loss or conversion of agricultural or other working lands, or natural resource lands for other uses according the Dept. of Conservation's Farmland Mapping and Monitoring Program (FMMP) website?				
If "Yes", provide documentation the HRI Project site is not within land designated as agricultural land per the FMMP tool.				
File Name	HRI No Ag	Demonstrate the HRI site is not within land designated as agricultural land per FMMP tool.	Uploaded to HCD?	N/A
If "No", demonstrate that the HRI Project site qualifies as an Infill Site (as defined in Appendix A):				
File Name	HRI Ag Infill	Demonstrate that HRI Project site qualifies as an Infill Site (as defined in Appendix A).	Uploaded to HCD?	N/A
(20)(B) We certify the HRI is infeasible without AHSC Program funds, and other committed funds are not and will not be supplanted by AHSC Program funds.				
(20)(C) If the AHD Project involves involving new construction or Substantial Rehabilitation and requiring the demolition of existing residential units are eligible only if the number of bedrooms in the new Project is at least equal to the number of bedrooms in the demolished structures, with equal or greater affordability. The new affordable units may exist on separate parcels provided all parcels are part of the same Project meeting the requirements of UMR 8303(b). Explain below how this requirement is satisfied in the replacement affordable housing development. If the Project does not involve demolition of existing affordable units, indicate "N/A" below.				
(20)(D) We certify the proposed AHD is consistent with State & Federal Fair Housing requirements including duties to affirmatively further fair housing (explain below).				
(20)(E) If approval by a local public works department, or other responsible local agency is required for the Project, provide document below. I certify that the HRI improvements are consistent with all applicable local rules, regulations, codes, policies and plans enforced or implemented by that entity.				
File Name	HRI Local Approvals	Statement from entity indicating the HRI Capital Project is consistent with all applicable local rules, regulations, codes, policies and plans enforced or implemented by that entity.	Uploaded to HCD?	N/A
Article XXXIV Authority				
<i>Article XXXIV opinion letters submitted to HCD must demonstrate the applicant has considered both the legal requirements of Article XXXIV and the Project's relevant facts (e.g., the state public body lenders, the number of low income restricted units, and the general content of any regulatory restrictions). Any conclusion that a project is exempt from Article XXXIV must be supported by specific facts and a specific legal theory for exemption that itself is supported by the Constitution, statute, and/or case law. Prior to the execution of the HCD Standard Agreement, Applicant must deliver to HCD satisfactory evidence that the Article XXXIV requirements of the California Constitution have been satisfied or are inapplicable.</i>				
File Name	Article XXXIV Attorney Opinion	Demonstrate legal requirements of Article XXXIV and relevant Project facts have been considered.	Uploaded to HCD?	Yes
Does the locality have sufficient Article XXXIV Authority to accommodate the Project? (If Project doesn't have Article XXXIV authority, AHSC may be limited to restricting no more than 49% of the total units.)	Yes	If yes, document Article XXXIV Project authority. May be done by providing info from appropriate local government official that voters passed a specific project referendum or a blanket referendum has been passed and the locality has allocated sufficient Article XXXIV authority to Project.		
File Name	Article XXXIV Authority	Copy of document providing Authority.	Uploaded to HCD?	Yes

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Tax Credits

Select appropriate entry for each item:

Project Tax Credit Type	4%	Federal	Yes	Proposed equity investor contribution (\$)	\$3,846,856	Anticipated tax credit factor	\$0.8800	App rate	N/A
		State	No	Proposed equity investor contribution (\$)	N/A	Anticipated tax credit factor	N/A	App rate	N/A
Timeframe for applying for 4% Tax Credits	Proposed month	February	Proposed year	2022					
If already awarded, date of the Tax Credit Reservation				N/A					

File Name	Tax Credit Reservation	If the Project has already received a tax credit reservation, upload documentation.				Uploaded to HCD?	N/A	
Does or will the senior debt and loan agreement comply with HCD's Multifamily Housing Program Regulations §7308, including the priority order of payments from cash flow?								Yes
Does or will the junior debt and loan agreement comply with HCD's Multifamily Housing Program Regulations §7308, including the priority order of payments from cash flow?								Yes
Are there any cost sharing agreements?	No	If there is commercial space not eligible to be funded by AHSC, is cost allocation based on total development cost?				N/A	If no, on what?	
What covenants or regulatory agreements are already on title?			None					
What covenants or regulatory agreements are anticipated?			San Francisco Mayor's Office of Housing and Community Development, California Tax Credit Allocation Committee.					

Milestones

Provide the actual or anticipated completion date for the following performance milestones for each applicable Capital Project. If a milestone is not applicable to a Capital Project, please enter "N/A"

Note: It is acknowledged that some of the following milestones may have already been achieved. For those milestones which have previously been met, 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.

Capital Project Milestone Schedule	AHD Date	HRI Date
Executed binding agreement between the Sponsor and developer of the proposed Affordable Housing Development detailing the terms and conditions of the Project.	8/28/20	N/A
Site Control of Affordable Housing Development site(s) by proposed housing developer.	2/1/21	N/A
Completion of all necessary environmental clearances, including those required under CEQA and NEPA.	8/28/20	N/A
Obtaining all necessary and discretionary public land use approvals.	8/28/20	N/A
Obtaining all enforceable funding commitments for at least the first phase of the Housing Development supported by the infrastructure Project.	10/1/21	N/A
Obtaining all enforceable funding commitments for all construction period financing.	10/1/21	N/A
Obtaining enforceable commitments for all construction/permanent financing described in the Sources and Uses including substantially final construction and permanent loan documents, and Tax Credit syndication documents for remaining phases of Project.	4/1/22	N/A
Submission of Final Construction Drawings and Specifications to the appropriate local building department or permitting authority.	8/1/22	N/A
Commencement of construction.	10/1/22	N/A
Construction complete and the filing of the Notice of Completion.	10/1/24	N/A
Program funds fully disbursed.	3/1/26	N/A
<i>Have all milestone dates been entered above?</i>	Yes	N/A

Balboa Reservoir AHD Units and Maximum AHD-HRI Funds PIN 47683

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AHD Unit Mix															San Francisco				Subsidy Program Name		Subsidy Program Name							
(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)	(J)	(K)	(L)	(M)	(N)	(O)	Monthly Rent	Unrestricted Monthly Rent	Proposed Monthly Rent	Utility Allowance	Monthly Rent Subsidy Amount	Subsidy Units	Monthly Rent Subsidy Amount	Subsidy Units	# of Baths	Square Feet	Other HCD Funding Source	Other Funding Units	Building Type	
0	Rental	30%	2	2		0	2	2	0			2			\$959		\$932	\$83					1	550			6+ story high-rise	
1	Rental	30%	12	12		0	12	12	0			12			\$1,027		\$1,027	\$97					1	700			6+ story high-rise	
2	Rental	30%	9	9		0	9	9	0			9			\$1,233		\$1,199	\$134					1	900			6+ story high-rise	
3	Rental	30%	3	3		0	3	3	0			3			\$1,425		\$1,332	\$169					1	1,280			6+ story high-rise	
0	Rental	50%	2	2		0	2	2	0			2			\$1,598		\$1,515	\$83					1	550			6+ story high-rise	
1	Rental	50%	11	11		0	11	11	0			11			\$1,713		\$1,713	\$97					1	700			6+ story high-rise	
3	Rental	50%	1	1		0	1	1	0			1			\$2,375		\$2,165	\$169					1	1,280			6+ story high-rise	
0	Rental	60%	3	3		0	3	3	0			3			\$1,918		\$1,865	\$83					1	550			6+ story high-rise	
1	Rental	60%	20	20		0	20	20	0			20			\$2,055		\$2,055	\$97					1	700			6+ story high-rise	
2	Rental	60%	19	19		0	19	19	0			19			\$2,467		\$2,398	\$134					1	900			6+ story high-rise	
3	Rental	60%	1	1		0	1	1	0			1			\$2,850		\$2,664	\$169					1	1,280			6+ story high-rise	
1	Rental	60%	1	1		0	1	1	0			1			\$2,055		\$2,056	\$97					1	700			6+ story high-rise	
2	Rental	60%	2	2		0	2	2	0			2			\$2,467		\$2,467	\$134					1	900			6+ story high-rise	
3	Rental	60%	1	1		0	1	1	0			1			\$2,850		\$2,850	\$169					1	1,280			6+ story high-rise	
0	Rental	80%	1	1		0	0	0	0			0			\$2,558		\$2,557	\$83					1	550			6+ story high-rise	
1	Rental	80%	15	15		0	0	0	0			0			\$2,741		\$2,741	\$97					1	700			6+ story high-rise	
2	Rental	80%	15	15		0	0	0	0			0			\$3,290		\$3,290	\$134					1	900			6+ story high-rise	
3	Rental	80%	5	5		0	0	0	0			0			\$3,801		\$3,800	\$169					1	1,280			6+ story high-rise	
2	Rental	none	1	1		1	0	0	0		1				\$0		\$0						1	900				
						0	0	0	0			0			\$0		\$0											
			124	124		0	1	87	87		1	0	87	0	0					0		0				0		

File Name: Utility Allowance | Local housing authority document showing current utility allowance chart, with relevant components circled. Uploaded to HCD? Yes
 \$104(b)(4) NOTE: Use of multiple HCD funding sources on the same Assisted Units (subsidy stacking) is prohibited. "HCD funding sources" shall mean loan or grant funds awarded for permanent funding of development costs (which shall not include funds specifically designated for capitalized operating or operating subsidy reserves) under the following programs: Supportive Housing Multifamily Housing, MHP, Veterans Housing and Homeless Prevention, No Place Like Home, Affordable Housing Sustainable Communities, Transit Oriented Development, Joe Serna, Junior Farmworker Housing Grant, SB 2 Farmworker Housing, and Housing for a Healthy California.

\$3,098,352	Annual Net Restricted Rent
\$3,066,240	Annual Net Proposed Rent
\$0	Annual Unrestricted Rent

Maximum HRI Grant Amount
 1 unrestricted units @ \$35,000 PU = \$35,000 87 restricted units @ \$50,000 PU = \$4,350,000 HRI Requested: \$0 Max HRI Grant: \$0

Maximum AHD Funding Amount
 Max AHSC AHD Funding Amounts. Click here for 2020 AHSC funding limits - (beginning on page 166)
 Max AHD Funding: \$19,610,404

Is Project applying for 9% Tax Credits?		Unrestricted Manager Funding Amount \$175,000										AHD Funds Requested \$19,610,404			
(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)	(J)	(K)	(L)	(M)	(N)	(O)	(P)
AMI Level	0 Bedroom Units			1 Bedroom Units			2 Bedroom Units			3 Bedroom Units			4+ Bedroom Units		
	Per Unit Amount	Number of Restricted units	Funding Amount (BxC)	Per Unit Amount	Number of Restricted units	Funding Amount (E x F)	Per Unit Amount	Number of Restricted units	Funding Amount (H x I)	Per Unit Amount	Number of Restricted units	Funding Amount (K x L)	Per Unit Amount	Number of Restricted units	Funding Amount (N x O)
60-80%	175,000	3	625,000	175,000	21	3,675,000	175,000	21	3,675,000	175,000	2	350,000	175,000	0	0
55%	197,039	0	0	198,480	0	0	203,233	0	0	207,699	0	0	211,300	0	0
50%	218,934	2	437,868	221,959	11	2,441,549	231,467	0	0	240,253	1	240,253	247,744	0	0
45%	240,830	0	0	245,439	0	0	259,700	0	0	272,808	0	0	284,044	0	0
40%	262,725	0	0	268,919	0	0	287,789	0	0	305,363	0	0	320,344	0	0
35%	284,764	0	0	292,543	0	0	316,022	0	0	338,062	0	0	356,788	0	0
30%	306,659	2	613,318	316,022	12	3,792,264	344,256	9	3,098,304	370,616	3	1,111,848	393,088	0	0
25%	328,554	0	0	339,502	0	0	372,489	0	0	403,171	0	0	429,532	0	0
20%	350,450	0	0	362,982	0	0	400,578	0	0	435,726	0	0	465,832	0	0
15%	372,489	0	0	386,461	0	0	428,811	0	0	468,424	0	0	502,131	0	0
Totals	0 Bdrm	7	1,576,186	1 Bdrm	44	9,908,813	2 Bdrm	30	6,773,304	3 Bdrm	6	1,702,101	4+ Bdrm	0	0

Commercial Space								
Type of Business (if known)	Total Units or Spaces	Total Space Square Feet	Expected Gross Rent	Gross Rent per Square Foot	Garage and Parking Space Revenue	Miscellaneous Rent Revenue	Other Revenue (specify)	Other Revenue (amount)
				\$0.00				
				\$0.00				
				\$0.00				
				\$0.00				
				\$0.00				
				\$0.00				
Total:	0	0	\$0		\$0	\$0		\$0
Average:	0	0	\$0	\$0.00	\$0	\$0		\$0

Describe the Proposed Commercial Use and Identify any Special Issues

Balboa Reservoir HRI and AHD Sources of Development Funds PIN 47683

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Construction Period Sources of Funds

*Deferred Costs are part of a threshold calculation-Overview worksheet §106(a)(7). You must identify all Deferred Costs in columns O and P. Deferred Costs are defined in Appendix A(p): "costs deferred at construction loan closing, including but not limited to: capitalized reserves, loan fees, syndication costs, legal, accounting, audit, consultant fees, and developer fees paid from operating cashflow."

Committed by Application Due Date?	AHD vs HRI Source	Source Name (listed in order of lien priority)	Source Type	Lien No.	Amount	Interest Rate	Required Payment	Loan Term (months)	Residential Amount	Commercial Amount	*Details of Deferred Costs	
											Amount	Description
	HRI	AHSC HRI Grant	State-HCD		\$0	0.00%						
Yes	AHD	Construction Loan	State-HCD	1	\$77,756,160	4.75%		35	\$77,756,160		\$20,000	Title, Recording
Yes	AHD	MOHCD Gap Financing		2	\$13,594,128			35	\$13,594,128		\$15,000	Legal
Yes	AHD	GP equity			\$100						\$2,500	Syndication Consultant
											\$50,840	TCAC monitoring fees
											\$679,995	TCA OpEx Reserve
											\$186,932	Perm Lender expenses (origination, legal, expenses)
	AHD	*Deferred Costs (enter details at right)			\$11,617,748						\$10,662,481	deferred developer fee
Yes	AHD	Equity Investor	TBD		\$3,384,895				\$3,384,895			
TOTALS					\$106,353,031				\$94,735,183	\$0	\$11,617,748	

Permanent Sources of Funds

C O L U M N	Committed by Application Due Date?	AHD vs HRI Source	Source Name See cell comments for Deferred Dev. Fee; list in lien priority order	Source Type	Lien No.	Amount	Interest Rate		Amortization Period (yrs.)	Repayment Terms		Required Residential Debt Service	Required Commercial Debt Service	Residential Amount	Commercial Amount	Balloon?
							Rate	Type		Type	Due in (yrs)					
1		HRI	AHSC HRI Grant	State-HCD										\$0		
2		AHD	AHSC AHD Funding	State-HCD	2	\$19,610,404	3.00%			Deferred	55	\$84,000		\$19,610,404		
3			Tax-Exempt Bond Loan											\$0		
4	Yes	AHD	Taxable perm loan	Private	1	\$21,591,000	5.00%	Fixed for Term	30	Fully Amortized	18	\$1,371,136		\$21,591,000		
5	Yes	AHD	MOHCD Gap Financing	Local	3	\$13,594,128	0.00%	Other		Deferred	55			\$13,594,128		
6	Yes	AHD	RCP Subsidy	Private	4	\$6,134,358	3.00%	Fixed for Term		Deferred	55			\$6,134,358		
7	No	AHD	AHP	Fed		\$1,230,000	0.00%	Other			55			\$1,230,000		
8	Yes	AHD	Priority DDF	Private		\$1,300,000								\$1,300,000		
9	Yes	AHD	Non-priority DDF	Private		\$9,044,095								\$9,044,095		
10	Yes	AHD	GP Equity	Private		\$100								\$100		
11														\$0		
12														\$0		
13														\$0		
14														\$0		
15														\$0		
16	Yes	AHD	Equity Investor: TBD			\$33,848,946								\$33,848,946		
Total Permanent Funding Sources Amount						\$106,353,031								\$33,848,946		
Total Committed Non-AHSC AHD & HRI Funds						\$85,512,627	\$51,663,681	<§107(f) Total Committed Non-AHSC AHD & HRI Funds				\$1,455,136	\$0	\$106,353,031	\$0	

See Appendix A (u) - for an explanation of Enforceable Funding Commitments (EFC). (3) **A land donation** in fee for no other consideration that is supported by an appraisal or purchase/sale agreement ("Land Donation") or a local fee waiver resulting in quantifiable cost savings for the Project where those fees are not otherwise required by federal or state law ("Local Fee Waiver") may 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 MAI-qualified appraiser within one year of 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.

File Name: EFC AHD HRI1; EFC AHD HRI2; EFC AHD HRI3; etc. Documentation for the 6 non-TCAC & non-AHSC AHD & HRI funding commitments. Uploaded to HCD? Yes

Applicant Comments: Include a description of unusual or extraordinary circumstances that have resulted in higher than expected Project costs and provide a justification as to why these costs are reasonable.

AHD Development Budget

4/27/21

DEVELOPMENT COST	Total Project Costs	Residential Costs	Commercial Costs	30% PVC for New Const/Rehab	30% PVC for Acquisition	Comments and explanation of basis changes
LAND COST/ACQUISITION						
Land Cost or Value	\$4,092,000	\$4,092,000				
Demolition	\$0					
Legal	\$80,000	\$80,000				
Land Lease Rent Prepayment	\$0					
Total Land Cost or Value	\$4,172,000	\$4,172,000	\$0			
Existing Improvements Cost or Value	\$0					
Off-Site Improvements	\$2,839,170	\$2,839,170		\$2,839,170		
Total Acquisition Cost	\$2,839,170	\$2,839,170	\$0		\$0	
Total Land Cost / Acquisition Cost	\$7,011,170	\$7,011,170	\$0			
Predevelopment Interest/Holding Cost	\$100,000	\$100,000				
Assumed, Accrued Interest on Existing Debt (Rehab/Acq)	\$0	\$0				
Excess Purchase Price Over Appraisal	\$0	\$0				
REHABILITATION						
Site Work	\$0					
Structures	\$0					
General Requirements	\$0					
Contractor Overhead	\$0					
Contractor Profit	\$0					
Prevailing Wages	\$0					
General Liability Insurance	\$0					
Urban Greening	\$0					
Other Rehabilitation: (Specify)	\$0					
Other Rehabilitation: (Specify)	\$0					
Other Rehabilitation: (Specify)	\$0					
Total Rehabilitation Costs	\$0	\$0	\$0	\$0	\$0	
Total Relocation Expenses	\$0					
NEW CONSTRUCTION						
Site Work	\$694,695	\$694,695		\$694,695		
Structures	\$62,934,104	\$62,934,104		\$62,934,104		
General Requirements	\$0					
Contractor Overhead	\$0					
Contractor Profit	\$0					
Prevailing Wages	\$0					
General Liability Insurance	\$0					
Urban Greening	\$0					
Other New Construction: Photovoltaic System	\$683,730	\$683,730		\$683,730		
Other New Construction: Security	\$125,000	\$125,000		\$125,000		
Other New Construction: (Specify)	\$0					
Total New Construction Costs	\$64,437,529	\$64,437,529	\$0	\$64,437,529	\$0	
ARCHITECTURAL FEES						
Design	\$1,574,689	\$1,574,689		\$1,574,689		
Supervision	\$200,000	\$200,000		\$200,000		
Total Architectural Costs	\$1,774,689	\$1,774,689	\$0	\$1,774,689	\$0	
Total Survey & Engineering	\$913,790	\$913,790		\$913,790		
CONSTRUCTION INTEREST & FEES						
Construction Loan Interest	\$6,551,541	\$6,551,541		\$3,145,766		
Origination Fee	\$413,917	\$413,917		\$52,950		
Credit Enhancement/Application Fee	\$0					
Bond Premium	\$0					
Cost of Issuance	\$535,360	\$535,360				
Title & Recording	\$50,000	\$50,000		\$50,000		
Taxes	\$185,120	\$185,120		\$185,120		
Insurance	\$1,277,272	\$1,277,272		\$1,277,272		
Employment Reporting	\$0					
Other Construction Int. & Fees: Construction Lender Counsel	\$30,000	\$30,000		\$3,838		
Other Construction Int. & Fees: Lender Expenses	\$40,000	\$40,000		\$5,117		
Total Construction Interest & Fees	\$9,083,210	\$9,083,210	\$0	\$4,720,063	\$0	
PERMANENT FINANCING						
Loan Origination Fee	\$161,933	\$161,933				
Credit Enhancement/Application Fee	\$0					
Title & Recording	\$20,000	\$20,000				
Taxes	\$0					

AHD Development Budget

4/27/21

DEVELOPMENT COST	Total Project Costs	Residential Costs	Commercial Costs	30% PVC for New Const/Rehab	30% PVC for Acquisition	Comments and explanation of basis changes
Insurance	\$0					
Other Perm. Financing Costs: Lender	\$25,000	\$25,000				
Other Perm. Financing Costs: CDLAC and Issuer Fees	\$0					
Total Permanent Financing Costs	\$206,933	\$206,933	\$0			
Subtotals Forward	\$83,527,321	\$83,527,321	\$0	\$74,685,241	\$0	
LEGAL FEES						
Legal Paid by Applicant	\$60,000	\$60,000		\$60,000		
Other Attorney Costs: Permanent Closing	\$15,000	\$15,000				
Other Attorney Costs: Organization of Partnership	\$7,500	\$7,500				
Other Attorney Costs: Syndication - GP	\$49,000	\$49,000				
Total Attorney Costs	\$131,500	\$131,500	\$0	\$60,000	\$0	
RESERVES						
Operating Reserve	\$679,995	\$679,995				
Replacement Reserve	\$0					
Transition Reserve	\$0					
Rent Reserve	\$0					
Other Reserve Costs: (Specify)	\$0					
Other Reserve Costs: (Specify)	\$0					
Other Reserve Costs: (Specify)	\$0					
Total Reserve Costs	\$679,995	\$679,995	\$0			
CONTINGENCY COSTS						
Construction Hard Cost Contingency	\$6,715,170	\$6,715,170		\$6,715,170		
Soft Cost Contingency	\$649,274	\$649,274		\$649,274		
Total Contingency Costs	\$7,364,444	\$7,364,444	\$0	\$7,364,444	\$0	
OTHER PROJECT COSTS						
TCAC App/Allocation/Monitoring Fees	\$90,309	\$90,309				
Environmental Audit	\$15,000	\$15,000		\$15,000		
Local Development Impact Fees	\$813,440	\$813,440		\$813,440		
Permit Processing Fees	\$331,177	\$331,177		\$331,177		
Capital Fees	\$0					
Marketing	\$238,750	\$238,750				
Furnishings	\$248,000	\$248,000		\$248,000		
Market Study	\$10,000	\$10,000				
Accounting/Reimbursable	\$0					
Appraisal Costs	\$10,000	\$10,000		\$10,000		
Broadband Readiness	\$0					
Other Costs: Start-up/Lease Up Expenses	\$124,000	\$124,000				
Other Costs: Audit/Cost Certification	\$50,000	\$50,000				
Other Costs: Printing	\$25,000	\$25,000		\$25,000		
Other Costs: Syndication Consultant	\$75,000	\$75,000				
Other Costs: Construction Supervision	\$75,000	\$75,000		\$75,000		
Total Other Costs	\$2,105,676	\$2,105,676	\$0	\$1,517,617	\$0	
SUBTOTAL PROJECT COST	\$93,808,936	\$93,808,936	\$0	\$83,627,302	\$0	
DEVELOPER COSTS						
Developer Overhead/Profit	\$12,544,095	\$12,544,095		\$12,544,095		
Consultant/Processing Agent	\$0					
Project Administration	\$0					
Broker Fees Paid to a Related Party	\$0	\$0				
Construction Oversight by Developer	\$0					
Other Developer Costs: (Specify)	\$0	\$0				
Total Developer Costs	\$12,544,095	\$12,544,095	\$0	\$12,544,095	\$0	
TOTAL PROJECT COST	\$106,353,031	\$106,353,031	\$0	\$96,171,397	\$0	
Eligible Basis:				\$96,171,397	\$0	
Total Eligible Basis:				\$96,171,397		

	DF 2021
Total Developer Fee (equals Total Developer Costs above):	\$12,544,095
Total Developer Fee paid from development funding sources:	\$2,200,000
Deferred Developer Fee payable on a priority basis from available Cash Flow:	\$1,300,000
Deferred Developer Fee payable from allowable 50% Distribution:	\$9,044,095
Developer Fee Contributed as Capital:	\$0

Balboa Reservoir AHD and HRI Permanent Sources and Uses PIN 47683

4/27/21

AFFORDABLE HOUSING DEVELOPMENT (AHD)																	AHD Residential and HRI Permanent Sources of Funds			Commercial Sources		Residential Cost Difference Dev Budget vs. Sources
USES OF FUNDS	Total Cost from AHD Dev Budget	AHSC HRI Grant	AHSC AHD Funding	Tax-Exempt Bond Loan	Taxable perm loan	MOHCD Gap Financing	RCP Subsidy	AHP	Priority DDF	Non-priority DDF	GP Equity	0	0	0	0	Equity Investor:	Total Residential Sources	Residential Costs	Commercial Costs	Source Name:	Source Name:	
Soft cost in red (total AHSC AHD below)																		Total	Total			
\$0																						
LAND COST/ACQUISITION																						
Land Cost or Value	\$4,092,000																\$4,092,000	\$4,092,000	\$4,092,000	\$0		
Demolition	\$0																	\$0	\$0	\$0	\$0	
Legal	\$80,000										\$100						\$79,900	\$80,000	\$80,000	\$0		
Land Lease Rent Prepayment	\$0																	\$0	\$0	\$0	\$0	
Total Land Cost or Value	\$4,172,000		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$0	\$0	\$4,171,900	\$4,172,000	\$4,172,000	\$0	\$0	
Existing Improvements Cost or Value	\$0																	\$0	\$0	\$0	\$0	
Off-Site Improvements	\$2,839,170																\$2,839,170	\$2,839,170	\$2,839,170	\$0		
Total Acquisition Cost	\$2,839,170		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,839,170	\$2,839,170	\$2,839,170	\$0	\$0	
Total Land Cost / Acquisition Cost	\$7,011,170		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$0	\$0	\$7,011,070	\$7,011,170	\$7,011,170	\$0	\$0	
Predevelopment Interest/Holding Cost	\$100,000																\$100,000	\$100,000	\$100,000	\$0		
Assumed, Accrued Interest on Existing Debt (Rehab/Acq)	\$0																	\$0	\$0	\$0	\$0	
Excess Purchase Price Over Appraisal	\$0																	\$0	\$0	\$0	\$0	
REHABILITATION																						
Site Work	\$0																	\$0	\$0	\$0	\$0	
Structures	\$0																	\$0	\$0	\$0	\$0	
General Requirements	\$0																	\$0	\$0	\$0	\$0	
Contractor Overhead	\$0																	\$0	\$0	\$0	\$0	
Contractor Profit	\$0																	\$0	\$0	\$0	\$0	
Prevailing Wages	\$0																	\$0	\$0	\$0	\$0	
General Liability Insurance	\$0																	\$0	\$0	\$0	\$0	
Urban Greening	\$0																	\$0	\$0	\$0	\$0	
Other Rehabilitation: (Specify)	\$0																	\$0	\$0	\$0	\$0	
Other Rehabilitation: (Specify)	\$0																	\$0	\$0	\$0	\$0	
Other Rehabilitation: (Specify)	\$0																	\$0	\$0	\$0	\$0	
Total Rehabilitation Costs	\$0		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Relocation Expenses	\$0																	\$0	\$0	\$0	\$0	
NEW CONSTRUCTION																						
Site Work	\$694,695																\$694,695	\$694,695	\$694,695	\$0		
Structures	\$62,934,104	\$19,610,404			\$21,591,000	\$13,594,128	\$6,134,358	\$1,230,000									\$774,214	\$62,934,104	\$62,934,104	\$0		
General Requirements	\$0																	\$0	\$0	\$0	\$0	
Contractor Overhead	\$0																	\$0	\$0	\$0	\$0	
Contractor Profit	\$0																	\$0	\$0	\$0	\$0	
Prevailing Wages	\$0																	\$0	\$0	\$0	\$0	
General Liability Insurance	\$0																	\$0	\$0	\$0	\$0	
Urban Greening	\$0																	\$0	\$0	\$0	\$0	
Other New Construction: Photovoltaic	\$683,730																\$683,730	\$683,730	\$683,730	\$0		
Other New Construction: Security	\$125,000																\$125,000	\$125,000	\$125,000	\$0		
Other New Construction: (Specify)	\$0																	\$0	\$0	\$0	\$0	
Total New Construction Costs	\$64,437,529	\$19,610,404	\$0	\$21,591,000	\$13,594,128	\$6,134,358	\$1,230,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,277,639	\$64,437,529	\$64,437,529	\$0	\$0	
ARCHITECTURAL FEES																						
Design	\$1,574,689																\$1,574,689	\$1,574,689	\$1,574,689	\$0		
Supervision	\$200,000																\$200,000	\$200,000	\$200,000	\$0		
Total Architectural Costs	\$1,774,689		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,774,689	\$1,774,689	\$1,774,689	\$0	\$0	
Total Survey & Engineering	\$913,790																\$913,790	\$913,790	\$913,790	\$0	\$0	
CONSTRUCTION INTEREST & FEES																						
Construction Loan Interest	\$6,551,541																\$6,551,541	\$6,551,541	\$6,551,541	\$0		
Origination Fee	\$413,917																\$413,917	\$413,917	\$413,917	\$0		
Credit Enhancement/Application Fee	\$0																\$0	\$0	\$0	\$0		
Bond Premium	\$0																\$0	\$0	\$0	\$0		
Cost of Issuance	\$535,360																\$535,360	\$535,360	\$535,360	\$0		
Title & Recording	\$50,000																\$50,000	\$50,000	\$50,000	\$0		
Taxes	\$185,120																\$185,120	\$185,120	\$185,120	\$0		
Insurance	\$1,277,272																\$1,277,272	\$1,277,272	\$1,277,272	\$0		
Employment Reporting	\$0																\$0	\$0	\$0	\$0		
Other Construction Int. & Fees: Construction	\$30,000																\$30,000	\$30,000	\$30,000	\$0		
Other Construction Int. & Fees: Lender	\$40,000																\$40,000	\$40,000	\$40,000	\$0		
Total Construction Interest & Fees	\$9,083,210		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$9,083,210	\$9,083,210	\$9,083,210	\$0	\$0	
PERMANENT FINANCING																						
Loan Origination Fee	\$161,933																\$161,933	\$161,933	\$161,933	\$0		
Credit Enhancement/Application Fee	\$0																\$0	\$0	\$0	\$0		
Title & Recording	\$20,000																\$20,000	\$20,000	\$20,000	\$0		
Taxes	\$0																\$0	\$0	\$0	\$0		
Insurance	\$0																\$0	\$0	\$0	\$0		
Other Perm. Financing Costs: Lender	\$25,000																\$25,000	\$25,000	\$25,000	\$0		
Other Perm. Financing Costs: CDLAC and Lender Fees	\$0																\$0	\$0	\$0	\$0		
Total Permanent Financing Costs	\$206,933		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$206,933	\$206,933	\$206,933	\$0	\$0	

Balboa Reservoir AHD and HRI Permanent Sources and Uses PIN 47683

4/27/21

AFFORDABLE HOUSING DEVELOPMENT (AHD)																		Commercial Sources			Residential Cost Difference Dev Budget vs. Sources			
AHD Residential and HRI Permanent Sources of Funds																		Source Name:	Source Name:					
USES OF FUNDS	Total Cost from AHD Dev Budget	AHSC HRI Grant	AHSC AHD Funding	Tax-Exempt Bond Loan	Taxable perm loan	MOHCD Gap Financing	RCP Subsidy	AHP	Priority DDF	Non-priority DDF	GP Equity	0	0	0	0	0	Equity Investor:	Total Residential Sources	Residential Costs	Commercial Costs	Source Name:	Source Name:	Residential Cost Difference Dev Budget vs. Sources	
Soft cost in red (total AHSC AHD below)																								
\$0																			Total	Total				
Subtotals Forward	\$83,527,321		\$19,610,404	\$0	\$21,591,000	\$13,594,128	\$6,134,358	\$1,230,000	\$0	\$0	\$100	\$0	\$0	\$0	\$0	\$0	\$21,367,331	\$83,527,321	\$83,527,321	\$0	\$0	\$0	\$0	
LEGAL FEES																								
Legal Paid by Applicant	\$60,000																\$60,000	\$60,000	\$60,000	\$0			\$0	
Other Attorney Costs: Permanent Closing	\$15,000																\$15,000	\$15,000	\$15,000	\$0			\$0	
Other Attorney Costs: Organization of Board/Committee	\$7,500																\$7,500	\$7,500	\$7,500	\$0			\$0	
Other Attorney Costs: Syndication - GP	\$49,000																\$49,000	\$49,000	\$49,000	\$0			\$0	
Total Attorney Costs	\$131,500		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$131,500	\$131,500	\$131,500	\$0	\$0	\$0	\$0	
RESERVES																								
Operating Reserve	\$679,995																\$679,995	\$679,995	\$679,995	\$0			\$0	
Replacement Reserve	\$0																\$0	\$0	\$0	\$0			\$0	
Transition Reserve	\$0																\$0	\$0	\$0	\$0			\$0	
Rent Reserve	\$0																\$0	\$0	\$0	\$0			\$0	
Other Reserve Costs: (Specify)	\$0																\$0	\$0	\$0	\$0			\$0	
Other Reserve Costs: (Specify)	\$0																\$0	\$0	\$0	\$0			\$0	
Other Reserve Costs: (Specify)	\$0																\$0	\$0	\$0	\$0			\$0	
Total Reserve Costs	\$679,995		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$679,995	\$679,995	\$679,995	\$0	\$0	\$0	\$0	
CONTINGENCY COSTS																								
Construction Hard Cost Contingency	\$6,715,170																\$6,715,170	\$6,715,170	\$6,715,170	\$0			\$0	
Soft Cost Contingency	\$649,274																\$649,274	\$649,274	\$649,274	\$0			\$0	
Total Contingency Costs	\$7,364,444		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$7,364,444	\$7,364,444	\$7,364,444	\$0	\$0	\$0	\$0	
OTHER PROJECT COSTS																								
TCAC App/Allocation/Monitoring Fees	\$90,309																\$90,309	\$90,309	\$90,309	\$0			\$0	
Environmental Audit	\$15,000																\$15,000	\$15,000	\$15,000	\$0			\$0	
Local Development Impact Fees	\$813,440																\$813,440	\$813,440	\$813,440	\$0			\$0	
Permit Processing Fees	\$331,177																\$331,177	\$331,177	\$331,177	\$0			\$0	
Capital Fees	\$0																\$0	\$0	\$0	\$0			\$0	
Marketing	\$238,750																\$238,750	\$238,750	\$238,750	\$0			\$0	
Furnishings	\$248,000																\$248,000	\$248,000	\$248,000	\$0			\$0	
Market Study	\$10,000																\$10,000	\$10,000	\$10,000	\$0			\$0	
Accounting/Reimbursable	\$0																\$0	\$0	\$0	\$0			\$0	
Appraisal Costs	\$10,000																\$10,000	\$10,000	\$10,000	\$0			\$0	
Broadband Readiness	\$0																\$0	\$0	\$0	\$0			\$0	
Other Costs: Start-up/Lease Up Expenses	\$124,000																\$124,000	\$124,000	\$124,000	\$0			\$0	
Other Costs: Audit/Cost Certification	\$50,000																\$50,000	\$50,000	\$50,000	\$0			\$0	
Other Costs: Printing	\$25,000																\$25,000	\$25,000	\$25,000	\$0			\$0	
Other Costs: Syndication Consultant	\$75,000																\$75,000	\$75,000	\$75,000	\$0			\$0	
Other Costs: Construction Supervision	\$75,000																\$75,000	\$75,000	\$75,000	\$0			\$0	
Total Other Costs	\$2,105,676		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,105,676	\$2,105,676	\$2,105,676	\$0	\$0	\$0	\$0	
SUBTOTAL PROJECT COST	\$93,808,936		\$19,610,404	\$0	\$21,591,000	\$13,594,128	\$6,134,358	\$1,230,000	\$0	\$0	\$100	\$0	\$0	\$0	\$0	\$0	\$31,648,946	\$93,808,936	\$93,808,936	\$0	\$0	\$0	\$0	
DEVELOPER COSTS																								
Developer Overhead/Profit	\$12,544,095								\$1,300,000	\$9,044,095							\$2,200,000	\$12,544,095	\$12,544,095	\$0			\$0	
Consultant/Processing Agent	\$0																\$0	\$0	\$0	\$0			\$0	
Project Administration	\$0																\$0	\$0	\$0	\$0			\$0	
Broker Fees Paid to a Related Party	\$0																\$0	\$0	\$0	\$0			\$0	
Construction Oversight by Developer	\$0																\$0	\$0	\$0	\$0			\$0	
Other Developer Costs: (Specify)	\$0																\$0	\$0	\$0	\$0			\$0	
Total Developer Costs	\$12,544,095		\$0	\$0	\$0	\$0	\$0	\$0	\$1,300,000	\$9,044,095	\$0	\$0	\$0	\$0	\$0	\$0	\$2,200,000	\$12,544,095	\$12,544,095	\$0	\$0	\$0	\$0	
TOTAL PROJECT COST	\$106,353,031		\$19,610,404	\$0	\$21,591,000	\$13,594,128	\$6,134,358	\$1,230,000	\$1,300,000	\$9,044,095	\$100	\$0	\$0	\$0	\$0	\$0	\$33,848,946	\$106,353,031	\$106,353,031	\$0	\$0	\$0	\$0	
HOUSING RELATED-INFRASTRUCTURE (HRI)																								
Site acquisition of HRI including easements and right of ways																								\$0
Other Site Acquisition (Specify):																								\$0
TOTAL SITE ACQUISITION (Not Parking)			\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0				\$0
Clearing and Grubbing																								\$0
Demolition																								\$0
Excavation																								\$0
Grading (not grading for housing & mixed use structural improvements)																								\$0
Soil Stabilization (Lime, etc.)																								\$0
Erosion/Weed Control																								\$0
Dewatering																								\$0
Other Site Preparation (Specify):																								\$0
Other Site Preparation (Specify):																								\$0
TOTAL SITE PREPARATION			\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0				\$0
Sanitary Sewer																								\$0
Potable Water																								\$0
Non-Potable Water																								\$0
Storm Drain																								\$0

Balboa Reservoir AHD and HRI Permanent Sources and Uses PIN 47683

4/27/21

AFFORDABLE HOUSING DEVELOPMENT (AHD)		AHD Residential and HRI Permanent Sources of Funds																	Residential Costs		Commercial Sources		Residential Cost Difference Dev Budget vs. Sources
USES OF FUNDS	Total Cost from AHD Dev Budget	AHSC HRI Grant	AHSC AHD Funding	Tax-Exempt Bond Loan	Taxable perm loan	MOHCD Gap Financing	RCP Subsidy	AHP	Priority DDF	Non-priority DDF	GP Equity	0	0	0	0	0	Equity Investor:	Total Residential Sources	Total	Total	Source Name:	Source Name:	
Soft cost in red (total AHSC AHD below)																							
\$0																							
Detention Basin/Culverts																							
Joint Trench:																							
Other Site Utilities (Specify):																							
TOTAL SITE UTILITIES		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Aggregate Base																							
Asphalt Pavement																							
Curb, Gutter, Sidewalk																							
Street Lights																							
Striping/Signage/Barricades																							
Traffic Mitigation																							
Other Surface Improvements (Specify):																							
TOTAL SURFACE IMPROVEMENTS		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Urban Greening (Specify):																							
Urban Greening (Specify):																							
Urban Greening (Specify):																							
Urban Greening (Specify):																							
TOTAL URBAN GREENING		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Irrigation																							
Concrete Work																							
Landscaping																							
Playground Facilities and Tot Lots																							
Walking/Bike Path																							
Drinking Fountains																							
Structures																							
Lighting																							
Open Space																							
Other Landscape and Amenities (Specify):																							
TOTAL LANDSCAPE AND AMENITIES		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Wetland Mitigation																							
Endangered Species																							
Tree Mitigation																							
Environmental Remediation																							
Other Env. Mitigation/Remediation (Specify):																							
TOTAL ENV. MITIGATION/REMEDATION		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Residential Parking Structures																							
Grading																							
Foundation Work																							
Site Work																							
Other Replacement Parking Costs (Specify):																							
Other Replacement Parking Costs (Specify):																							
TOTAL REPLACEMENT PARKING		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Residential Parking Structures																							
Grading																							
Foundation Work																							
Site Work																							
Other Residential Parking Costs (Specify):																							
Other Residential Parking Costs (Specify):																							
TOTAL RESIDENTIAL PARKING		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Access Plazas																							
Pathways																							
Bus Shelters																							
Transit Shelters																							
Pedestrian Facilities																							
Bicycle Facilities																							
Other Transit Costs (Specify):																							
TOTAL TRANSIT		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Drainage																							
Parks & Recreation																							
Streets/Signals																							
Traffic Fees																							
Waste Water																							
Water Facility																							
Other Impact Fees (Specify):																							
Other Impact Fees (non-AHSC eligible)																							
TOTAL IMPACT FEES		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Engineering																							

Balboa Reservoir AHD and HRI Permanent Sources and Uses PIN 47683

4/27/21

AFFORDABLE HOUSING DEVELOPMENT (AHD)		AHD Residential and HRI Permanent Sources of Funds															Commercial Sources		Residential Cost Difference Dev Budget vs. Sources				
USES OF FUNDS	Total Cost from AHD Dev Budget	AHSC HRI Grant	AHSC AHD Funding	Tax-Exempt Bond Loan	Taxable perm loan	MOHCD Gap Financing	RCP Subsidy	AHP	Priority DDF	Non-priority DDF	GP Equity	0	0	0	0	0	Equity Investor:	Total Residential Sources		Residential Costs	Commercial Costs	Source Name:	Source Name:
Soft cost in red (total AHSC AHD below)	\$0																						
Design																			\$0				
Contractor Fee																			\$0				
Other Soft Costs (Specify):																			\$0				
TOTAL SOFT COSTS		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Employment Reporting																			\$0				
Other Costs (Specify):																			\$0				
Other Costs (Specify):																			\$0				
TOTAL OTHER ASSET COSTS		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
HRI TOTAL PROJECT COSTS		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
AHD TOTAL PROJECT COSTS	\$106,353,031	\$0	\$19,610,404	\$0	\$21,591,000	\$13,594,128	\$6,134,358	\$1,230,000	\$1,300,000	\$9,044,095	\$100	\$0	\$0	\$0	\$0	\$0	\$33,848,946	\$106,353,031	\$106,353,031	\$0	\$0	\$0	\$0
TOTAL AHD & HRI PROJECT COSTS		\$0	\$19,610,404	\$0	\$21,591,000	\$13,594,128	\$6,134,358	\$1,230,000	\$1,300,000	\$9,044,095	\$100	\$0	\$0	\$0	\$0	\$0	\$33,848,946	\$106,353,031	\$106,353,031	\$0	\$0	\$0	\$0
<i>Provide Urban Greening Details and explain unusual or extraordinary circumstances that have resulted in higher than expected Project costs; provide a justification as to why these costs are reasonable.</i>																							

2021 TCAC Threshold Basis Limit for HCD Developer Fee 2017 UMR §8312(c) & (b) and High Cost Test for HCD Limits on Development Costs 2017 UMR §8311(a) & (b) (revised 3/24/21)

Complete all yellow shaded cells; see cell comments for tips

Project Name: Balboa Reservoir		County: San Francisco	HCD Phase:	Origination
Unit Size	1/5/21 TCAC Threshold Basis Limits (TBL)	Number of Units		Basis x Number of Units
SRO/Studio	\$511,928	8		\$4,095,424
1 Bedroom	\$590,248	59		\$34,824,632
2 Bedrooms	\$712,000	46		\$32,752,000
3 Bedrooms	\$911,360	11		\$10,024,960
4+ Bedrooms	\$1,015,312	0		\$0
Number of Manager Units in Project:	1	TOTAL UNITS:	124	
TOTAL UNADJUSTED THRESHOLD BASIS LIMIT (TBL):				\$81,697,016
TBL ADJUSTMENTS §10327(c)(5)(A-F):				Yes/No
(A) Project paid in whole or part out of public funds subject to a legal requirement for the payment of state or federal prevailing wages or financed in part by a labor-affiliated organization requiring the employment of construction workers who are paid at least state or federal prevailing wages. (20%)				Yes
				\$16,339,403
Project certifies that (1) they are subject to a project labor agreement within the meaning of §2500(b)(1) of the Public Contract Code, or (2) they will use a skilled and trained workforce as defined by §25536.7 of the Health and Safety Code to perform all onsite work within an apprenticeship occupation in the building and construction trades. (5%)				Yes
				\$4,084,851
New construction project required to provide parking beneath residential units (not "tuck under" parking) or through construction of an on-site parking structure of two or more levels. (10%)				No
				\$0
Project where a day care center is part of the development. (2%)				No
				\$0
Project where 100 percent of the Low Income units are for Special Needs populations. (2%)				No
				\$0
Project where at least 95% of the project's upper floor units are serviced by an elevator. (10%)				Yes
				\$8,169,702
Project wherein at least 95% of the building(s) is constructed as Type I as defined in the California Building Code, in which case, the Type III 10% increase below is not allowed. (15%)				No
				\$0
Project wherein at least 95% of the building(s) is constructed as a Type III as defined in the California Building Code, or a Type III/Type I combination, in which case, the Type I 15% increase above is not allowed. (10%)				No
				\$0
(B) Project applying under §10325 or §10326 of these regulations that include one or more of the features below. (up to 10%)				
Proposed energy efficiency/resource conservation/indoor air quality items	(1) Project shall have onsite renewable generation estimated to produce 50% or more of annual tenant electricity use. If the combined available roof area of the Project structures, including carports, is insufficient for provision of 50% of annual electricity use, then the Project shall have onsite renewable generation based on at least 90% of the available solar accessible roof area. Available solar accessible area is defined as roof area less north facing roof area for sloped roofs, equipment, solar thermal hot water and required local or state fire department set-backs and access routes. A Project not availing itself of the 90% roof area exception may also receive an increase under paragraph (2) only if the renewable generation used to calculate each basis increase does not overlap. (5%)			No
	(2) Project shall have onsite renewable generation estimated to produce 75% or more of annual common area electricity use. If the combined available roof area of the Project structures, including carports, is insufficient for provision of 75% of annual electricity use, then the Project shall have onsite renewable generation based on at least 90% of the available solar accessible roof area. Available solar accessible area is defined as roof area less north facing roof area for sloped roofs, equipment, solar thermal hot water and required local or state fire department set-backs and access routes. A Project not availing itself of the 90% roof area exception may also receive an increase under paragraph (1) only if the renewable generation used to calculate each basis increase does not overlap. (2%)			No
	(3) Newly constructed Project buildings shall be 15% or more energy efficient than the 2016 Energy Efficiency Standards (California Code of Regulations, Part 6 of Title 24), except that if the local building department has determined that building permit applications submitted on or before December 31, 2016 are complete, then newly constructed Project buildings shall be fifteen percent (15%) or more energy efficient than the 2013 Energy Efficiency Standards (California Code of Regulations, Part 6 of Title 24). (4%)			No
	(4) Rehab Project buildings shall have 80% decrease in estimated TDV energy use (or improvement in energy efficiency) post rehab as demonstrated using the appropriate performance module of CEC software. (4%)			No
	(5) Irrigate only with reclaimed water, greywater, or rainwater (excepting water used for Community Gardens) or irrigate with reclaimed water, grey water, or rainwater in an amount that annually equals or exceeds 20,000 gallons or 300 gallons per unit, whichever is less. (1%)			Yes
	(6) Community Gardens of at least 60 square feet per unit. Permanent site improvements that provide a viable growing space within the Project including solar access, fencing, watering systems, secure storage space for tools, and pedestrian access. (1%)			No
	(7) Install bamboo, cork, salvaged or FSC-Certified wood, natural linoleum, natural rubber, or ceramic tile in all kitchens, living rooms, and bathrooms (where no VOC adhesives or backing is also used). (1%)			No
	(8) Install bamboo, stained concrete, cork, salvaged or FSC-Certified wood, ceramic tile, or natural linoleum in all common areas. (2%)			No
	(9) Meet all requirements of the U.S. Environmental Protection Agency Indoor Air Plus Program. (2%)			No
(D) Project requires seismic upgrading of existing structures, and/or requires toxic or other environmental mitigation as certified by the Project architect/ engineer. (lesser of costs or 15% basis adjustment)				No
If Yes, select type of work:				\$0
Enter Certified Costs of Work:				\$0
(E) Local development impact fees required to be paid to local government entities. Certification from local entities assessing fees also required. WAIVED IMPACT FEES ARE INELIGIBLE.				Yes
				\$813,440
				<i>Please Enter Amount Above:</i>
(F) Projects within a county with an unadjusted 9% threshold basis limit for a 2-bedroom unit equal or less than \$400,000 and within a census tract designated on the TCAC/HCD Opportunity Map as Highest or High Resource. (10%)				No
				\$0
County eligibility:	No	<u>TCAC/HCD Opportunity Area Map Tract ID #:</u>	6075031000	Opportunity Map Resource level:
		Highest Resource		

	A	B	C	D	E	F	G	H	I
1	HCD 2021 Developer Fee Calculator - revised 2/4/21 (complete YELLOW shaded cells)								
2	Project Phase:	Origination	Proposed Project Type:	4% Credits New Construction					
3	Project Name:	Balboa Reservoir							
4	Project's Developer Fee Summary						HCD Limit	Project Amt.	
5	Maximum Total Developer Fee - 2d						\$12,544,095	\$12,544,095	
6	Max Developer Fee payable from development funding sources - lesser of 1e & 2d						\$2,200,000	\$2,200,000	
7	Deferred Developer Fee payable on a priority basis from available Cash Flow						\$1,300,000	\$1,300,000	
8	Deferred Developer Fee payable exclusively from Sponsor Distributions						\$9,044,095	\$9,044,095	
9	Total Budgeted or Actual Developer Fee				\$12,544,095				
10	Developer Fee Contributed as Capital				\$0		Deferred Developer Fee	\$10,344,095	
11									
12	Section 1. UMR §8312(c)(1) Max Developer Fee payable from funding sources - 4% Projects use TCAC 9% rules								
13	a. Project's type of construction:	New Construction							\$2,200,000
14	b. Project's Unadjusted Eligible Basis (excluding Developer Fee) - §10327(c)(2)(A)					\$83,627,302	x 15% =	\$12,544,095	
15	c. Project's Unadjusted Eligible Acquisition Basis (excluding Developer Fee) - §10327(c)(2)(A)					\$0	x 5% =	\$0	
16	d. Project's Non-Residential Costs (excluding Developer Fee) - §10327(c)(2)(A)					\$0	x 15% =	\$0	
17	e. Maximum Developer Fee payable from development funding sources - UMR §8312(c)(1) - lesser of 1a or (1b + 1c + 1d)							\$2,200,000	
18									
19	Section 2. UMR §8312(c) - Maximum Developer Fee using TCAC 4% rules								
20	a. BIPOC Project meeting CDLAC §5230(f)(1)(B) - §10327(c)(2)(E)								No
21	b. New Construction & Rehab - Unadjusted Eligible Basis (exclude Developer Fee) - §10327(c)(2)(B)(i)					\$83,627,302	x 15% =	\$12,544,095	
22	c. Basis for non-residential project costs (exclude Developer Fee) - §10327(c)(2)(B)(ii)					\$0	x 15% =	\$0	
23	d1. Not Applicable								
24	d2. Not Applicable								
25	d3. Not Applicable								
26	d4. Not Applicable					\$0	X 5% =	\$0	
27	e. Maximum Total Developer Fee using TCAC 4% rules §8312(c)							\$12,544,095	
28	f. Total Budgeted or Actual Developer Fee							\$12,544,095	
29	g. Budgeted Developer Fee paid from Development Sources						<i>Sum of Deferred and Contributed Developer Fee</i>	\$10,344,095	\$2,200,000
30	h. Deferred Developer Fee payable on a priority basis from available Cash Flow							\$1,300,000	

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	\$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		Includes Retirement Plan Contributions
	6723	Employee Benefits	\$53,618	No	
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	
None	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		\$3,066,240		
	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		\$17,712		
5170	Garage and Parking Spaces		\$0	\$0	
5990	Miscellaneous Rent Revenue		\$0	\$0	
Gross Potential Income (GPI)			\$3,083,952	\$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)		\$154,198	\$0	
Effective Gross Income (EGI)			\$2,929,754	\$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		\$11,240	\$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		\$138,098	\$0	Professional (HOA), Telephone/Answering Service,
6263T	Total Administrative Expenses		\$362,714	\$0	

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	\$14,000	\$0	
6520	Contracts	\$68,500	\$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	Uniforms
6500T	TOTAL Operating & Maintenance Expenses	\$264,448	\$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	California Franchise Tax and Elevator Permits
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	\$0	
6990	Other Supportive Services Costs: (specify)	\$0	\$0	
6990	Other Supportive Services Costs: (specify)	\$0	\$0	
6900T	Total Supportive Services Costs	\$60,000	\$0	
Total Operating Expenses		\$1,165,136	\$0	Comments
Funded Reserves: 7200		Residential	Commercial	
7210	Required Replacement Reserve Deposits	\$62,000	\$0	
7220	Other Reserves: (specify)	\$0	\$0	
7230	Other Reserves: (specify)	\$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		\$1,702,618	\$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	Miscellaneous Financial Expenses: (specify)	\$0	\$0	
6890	Miscellaneous Financial Expenses: (specify)	\$0	\$0	
6800T	Total Financial Expenses	\$1,480,489	\$0	
Cash Flow		\$222,129	\$0	
7190	Asset Management/Similar Fees	\$0	\$0	
Total Operating Expenses Per Unit		Per Year	Per Month	
Without any Adjustments		\$9,396	\$783	
With the Value of Rent-Free Units Included		\$9,396	\$783	
Without RE Taxes, Social Services Coordinator or Social Services/Social Programs and With the Value of Rent Fee Units Included		\$8,888	\$741	

Cash Flow Analysis

Is Income from Restricted Units based on Restricted or Proposed Rents?		Proposed Rents																			
		0																			
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	Year 16	Year 17	Year 18	Year 19	Year 20
Restricted Unit Rents	2.0%	3,066,240	3,127,565	3,190,116	3,253,918	3,318,997	3,385,377	3,453,084	3,522,146	3,592,589	3,664,441	3,737,729	3,812,484	3,888,734	3,966,508	4,045,839	4,126,755	4,209,290	4,293,476	4,379,346	4,466,933
Unrestricted Units	2.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Tenant Assistance Payments																					
Subsidy Program Name	2.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Subsidy Program Name	2.0%	0	0	0	0	0	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	0	0	0	0	0
Other: (specify)	2.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Gross Potential Income - Housing		3,066,240	3,127,565	3,190,116	3,253,918	3,318,997	3,385,377	3,453,084	3,522,146	3,592,589	3,664,441	3,737,729	3,812,484	3,888,734	3,966,508	4,045,839	4,126,755	4,209,290	4,293,476	4,379,346	4,466,933
Other Income																					
Laundry & Vending	2.0%	17,712	18,066	18,428	18,796	19,172	19,555	19,947	20,346	20,752	21,167	21,591	22,023	22,463	22,912	23,371	23,838	24,315	24,801	25,297	25,803
Other Income	2.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Commercial Income	2.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Gross Potential Income - Other		17,712	18,066	18,428	18,796	19,172	19,555	19,947	20,346	20,752	21,167	21,591	22,023	22,463	22,912	23,371	23,838	24,315	24,801	25,297	25,803
Gross Potential Income - Total		3,083,952	3,145,631	3,208,544	3,272,715	3,338,169	3,404,932	3,473,031	3,542,491	3,613,341	3,685,608	3,759,320	3,834,507	3,911,197	3,989,421	4,069,209	4,150,593	4,233,605	4,318,277	4,404,643	4,492,736
Vacancy Assumptions																					
Restricted Units	5.0%	153,312	156,378	159,506	162,696	165,950	169,269	172,654	176,107	179,629	183,222	186,886	190,624	194,437	198,325	202,292	206,338	210,465	214,674	218,967	223,347
Unrestricted Units	5.0%	0	0	0	0	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	0	0	0	0	0
Other: (specify)	5.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Laundry/Vending/Other Income	5.0%	886	903	921	940	959	978	997	1,017	1,038	1,058	1,080	1,101	1,123	1,146	1,169	1,192	1,216	1,240	1,265	1,290
Commercial Income	50.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Vacancy Loss		154,198	157,282	160,427	163,636	166,908	170,247	173,652	177,125	180,667	184,280	187,966	191,725	195,560	199,471	203,460	207,530	211,680	215,914	220,232	224,637
Effective Gross Income		2,929,754	2,988,349	3,048,116	3,109,079	3,171,260	3,234,686	3,299,379	3,365,367	3,432,674	3,501,328	3,571,354	3,642,781	3,715,637	3,789,950	3,865,749	3,943,064	4,021,925	4,102,363	4,184,411	4,268,099
Operating Expenses & Reserve Deposits																					
Residential Exp. (w/o Real Estate Taxes & Sup. Services)	3.0%	1,102,136	1,135,200	1,169,256	1,204,334	1,240,464	1,277,678	1,316,008	1,355,488	1,396,153	1,438,037	1,481,179	1,525,614	1,571,382	1,618,524	1,667,080	1,717,092	1,768,605	1,821,663	1,876,313	1,932,602
Real Estate Taxes	3.0%	3,000	3,090	3,183	3,278	3,377	3,478	3,582	3,690	3,800	3,914	4,032	4,153	4,277	4,406	4,538	4,674	4,814	4,959	5,107	5,261
Supportive Services Costs	3.0%	60,000	61,800	63,654	65,564	67,531	69,556	71,643	73,792	76,006	78,286	80,635	83,054	85,546	88,112	90,755	93,478	96,282	99,171	102,146	105,210
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	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	0	0	0	0	0
Ground Lease	2.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Commercial Expenses	3.0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Expenses & Reserves		1,227,136	1,262,090	1,298,093	1,335,176	1,373,371	1,412,712	1,453,233	1,494,970	1,537,959	1,582,238	1,627,845	1,674,821	1,723,205	1,773,041	1,824,373	1,877,244	1,931,701	1,987,792	2,045,566	2,105,073
Net Operating Income		1,702,618	1,726,259	1,750,024	1,773,903	1,797,890	1,821,974	1,846,146	1,870,397	1,894,715	1,919,090	1,943,509	1,967,961	1,992,432	2,016,908	2,041,376	2,065,820	2,090,224	2,114,571	2,138,845	2,163,026
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	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	0	0	0	0	0
2nd Mortgage		0	0	0	0	0	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	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	109,353	109,353	109,353	109,353	109,353
Total Required Debt Service		1,480,489																			
Cash Flow after all debt service		222,129	245,770	269,535	293,414	317,401	341,485	365,657	389,908	414,226	438,601	463,020	487,472	511,943	536,419	560,887	585,331	609,735	634,082	658,356	682,537
Debt Service Coverage Ratio (DSCR)		1.15	1.17	1.18	1.20	1.21	1.23	1.25	1.26	1.28	1.30	1.31	1.33	1.35	1.36	1.38	1.40	1.41	1.43	1.44	1.46
Use of Cash Flow After Debt Service - HCD Projects																					
Asset Mgmt./ Similar Fees		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deferred Developer Fee prior to Distributions & residual receipt payments		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cash Available for Residual Receipts Loans and Sponsor Distributions		222,129	245,770	269,535	293,414	317,401	341,485	365,657	389,908	414,226	438,601	463,020	487,472	511,943	536,419	560,887	585,331	609,735	634,082	658,356	682,537
Sponsor Distributions	50%	111,065	122,885	134,767	146,707	158,700	170,742	182,828	194,954	207,113	219,300	231,510	243,736	255,971	268,210	280,443	292,665	304,867	317,041	329,178	341,268
HCD Residual Payment	50%	111,065	122,885	134,767	146,707	158,700	170,742	182,828	194,954	207,113	219,300	231,510	243,736	255,971	268,210	280,443	292,665	304,867	317,041	329,178	341,268
Other Residual Payments	0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other Residual Payments	0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other Residual Payments	0%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other Residual Payments	0%	0	0	0	0	0															

STI Project Summary

Project Name	Description (include: the general location and description of each STI improvement and note if sidewalks are new or replaced. Please include other descriptive information such as key gaps closed and connections established.)	Address	City	Zip	County	Census Tracts	APNs
STI #1	Purchase of 2 BART Rail Cars	BART will purchase two new BART cars. These vehicle purchases are part of BART's Transbay Corridor Core Capacity Program, which will increase the number of trains operating through the Transbay Tube during peak hours, increase train lengths, and maximize throughput capacity throughout the system, increasing BART's capacity to carry passengers.	Alameda, Contra Costa, San Francisco, and San Mateo Counties	San Francisco	94112	San Francisco	6075031000
	Latitude: 37.72627	Longitude: -122.454094	Select the primary transit mode supported by this STI:			Heavy rail	

STI #2	Active Transportation	Installation of 2,802 LF of new context sensitive Class II, III, and Class IV bikeways on Lee Ave that connect to existing bike networks. Installation of 2,802 LF of new sidewalks along Lee Ave, which results in a key pedestrian network gap closure.	11 Frida Kahlo Way	San Francisco	94112	San Francisco	6075031000
	Latitude: 37.72627	Longitude: -122.454094	Select the primary transit mode supported by this STI:			N/A	

STI #3							
	Latitude:	Longitude:	Select the primary transit mode supported by this STI:				

Bike Facility (BF) 1 - Linear Miles	0.11	BF1 Type	Class II	Bike Facility 2 - Linear Miles	0.07	BF2 Type	Class III	Bike Facility 3 - Linear Miles	0.35	BF3 Type	Class IV	
Safe and Accessible Walkways - length (in feet) of new or replaced sidewalk				2,419	# of Transit Routes Improved		1	Added or Improved Transit Service				Yes
Enter # and Amount for each	Crosswalks	4	AHSC Funds	\$131,000	Overcrossings	0	AHSC Funds	\$0	Undercrossings	0	AHSC Funds	\$0
	Rail Cars	2	AHSC Funds	\$5,034,000	Street Cars	0	AHSC Funds	\$0	Buses	0	AHSC Funds	\$0
	Shuttles	0	AHSC Funds	\$0	Vans	0	AHSC Funds	\$0	Total New Vehicles	2	Total AHSC New Vehicle Funding	\$5,034,000

STI Eligible Costs §103(a)(3)(A) and Ineligible Costs §103(c)

(i) Applicant certifies capital improvements in the STI budget result in the improvement or addition of infrastructure that encourages mode-shift by enhancing: 1) public transit access; 2) pedestrian network; or 3) bicycle network (includes public bike-share infrastructure and fleet) within the defined Project Area meeting the §102(c) or (d) transit requirements. Yes

	Budgeted	Cost Cap	Overage	
(ii) Total amount of eligible STI soft costs cannot exceed 30% of the total AHSC Program award.	\$0	\$8,875,646	\$0	Ok

(iv) Total amount of Activity Delivery Costs associated with the implementation of the Capital Project cannot exceed 10% of the costs associated with the Capital Project.	\$367,617	\$962,269	\$0	Ok
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(vi) Capital Project costs in budget that are required as a condition of local approval for the STI? No If Yes, upload documentation below

File Name	STI Cap Project Costs	Documentation showing Capital Project costs are required as a condition of local approval for STI.	Uploaded to HCD?	N/A
(B) Total combined requested grant amount for your STI Capital Projects and TRA Capital Projects cannot exceed \$10M?				Ok

§103(c) We certify the AHSC STI funded cost do not include any of the following ineligible costs:

- (1) Costs are not eligible if there is another feasible, available source of committed funding for the STI portion to be funded by AHSC or if the cost is incurred prior to the AHSC award;
 - (2) Routine maintenance or operations of transportation infrastructure including the general transit fleet, not including maintenance or operations associated with AHSC funded transit service expansion, including expansion beyond service levels offered during the COVID-19 pandemic;
 - (3) In lieu fees for local inclusionary housing programs;
 - (4) Ongoing operational costs beyond the term of the grant (three years) for Program Costs;
 - (5) All costs associated with automobile or motorcycle parking (excluding electric vehicle charging infrastructure);
 - (6) Costs and fees associated with the ongoing provision of internet service.
- Yes

STI Grant Terms §104(c)

- (1) We certify the STI grant does not result in a profit that exceeds the commercially reasonable range for other improvements of similar size and level of risk. Yes
- (2) We acknowledge that AHSC Program grant funds will be disbursed as reimbursed progress payments for eligible costs incurred after the execution of the Standard Agreement in the amount not to exceed the AHSC Program award of funds. Costs incurred prior to execution of the Standard Agreement are not eligible for reimbursement. Yes
- (3) We acknowledge if the STI Project includes multiple phases or developments, all entitlements and construction funding commitments for the first phase must be received prior to disbursement. Yes

STI Threshold §106(a)

(7) STI Enforceable Funding Commitments (EFC): *see Appendix A (t) - for an explanation of Enforceable Funding Commitments (EFC).*

EFC #	Committed by Full App Deadline?	Commitment Date	Source Name (listed in order of lien priority)	Source Type	Lien No.	Amount	Interest Rate		Term - # of months	Required Debt Service	Balloon ?
							Rate	Type			
1	Yes		AHSC STI Grant	State-HCD		\$7,988,935					
2	Yes	12/18/13	FTA Formula Funds	Fed	N/A	\$1,633,754	N/A	N/A	N/A	N/A	N/A
3											
4											
5											
6											
7											
8											
9											
10											

\$1,633,754 < Total Committed Non-AHSC STI Funds **TOTAL (must equal STI Budget Amount) \$9,622,689**

Provide a description of unusual or extraordinary circumstances that have resulted in higher than expected Project costs and provide a justification as to why these costs are reasonable.

File Name EFC STI1; EFC STI2; EFC STI3; etc. Supporting documentation for the 1 non-AHSC STI funding commitments. Uploaded to HCD? Yes
 (8)(A) We acknowledge that completion and approval or adoption of all necessary environmental clearances for transportation components must be attained by initial disbursement of grant funds. Yes

NEPA: Is Federal funding proposed that will trigger NEPA requirements? Yes If Yes, enter date of "Authority to Use Grant Funds" 12/18/13

CEQA: Project approved "by-right"? Is Project Categorically Exempt? Yes Negative Declaration Date: N/A Final EIR Date: N/A

Discuss below any special NEPA and/or CEQA Special Circumstances or exemptions and provide estimated/actual completion dates of all necessary environmental clearances.
 STI#1: Environmentally cleared as part of Silicon Valley Rapid Transit project; see Site Control letter for additional details and attachments. Record of Decision (ROD) date: 6/24/10.

File Name STI Environmental Copy of all environmental clearances (e.g. Environmental Impact Report) or Notice of Exemption. Uploaded to HCD? N/A

File Name STI Auth to Use Grant Funds For NEPA only, 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? N/A

(9) If applicable, provide a listing and status of all discretionary local land use entitlements and permits, excluding design review, required to complete each STI Project that have been granted, submitted or to be applied for to the appropriate local agencies, or consistent with local planning documents.

Agency / Issuer	Land Use Approval Date	Approval Type	Comments

(11) Does applicant or Developer of Project have Site Control for each STI Project? If yes, enter site control form and the most recent execution date below (Site Control Appendix A) Yes

Form of site control (See Site Control in Appendix A): Other (describe below) Most recent document execution date: N/A

If leasehold estate: Rent based on restricted land value? N/A Is acquisition cost \$0 in Dev. Budget? N/A Prepaid lease loan used? If so answer (a-c) N/A

(a) Funding amount based on the Present Value of lease payments? N/A (b) Lender requesting Res. Receipts (not permissible) N/A (c) Has loan amount been entered as a finance cost? N/A

Describe any special circumstances, e.g. if there are multiple STI Projects provide site control information for each.

File Name STI Site Control Appropriate documentation to demonstrate the form of site control indicated above. Uploaded to HCD? Yes

(12) Applicants must demonstrate prior experience by providing evidence of two prior STI projects similar to the proposed AHSC Project in scope and size, which have been completed by the applicant during the ten years preceding the application due date. May demonstrate the requisite experience by using past experience of work completed of a Locality or Transportation Agency non-applicant so long as the applicant can provide an executed agreement with that specific Locality or Transportation Agency for the completion of the STI components of the AHSC Project for which funding is sought.

(12) Which applicant demonstrates the prior experience noted below: BRIDGE Housing Corporation

	STI Past Project #1	STI Past Project #2
Project Name	Rail Car Procurement Program	Potrero Hope Phase 1 Public Improvements
Development Entity	San Francisco Bay Area Rapid Transit District (BART)	Potrero Housing Associates I, L.P.
Completion Date	3/31/21	5/27/21
Brief Description	On May 10, 2012, the BART Board of Directors authorized the award of a contract to Bombardier Transit Corporation for the procurement of new rail cars. BART has replaced 296 of its rail cars as of March 2021 as part of an overall program to not only replace but to expand its fleet.	BRIDGE Housing Corporation, on behalf of Potrero Housing Associates I, L.P., has completed construction of various pedestrian improvements at 1101 Connecticut Street in San Francisco, CA. These improvements include pavement section, concrete curbs and gutters, concrete sidewalks and curb ramps, street lighting, street landscaping, and storm water controls.

File Name Past Exp STI1, Past Exp STI2 Where the party making improvements funded by AHSC is not a public entity, an executed agreement from a public agency certifying the satisfactory completion of similar infrastructure improvements. Uploaded to HCD? Yes

(13) We certify as of the application date, the applicants or the STI real property is not party to or the subject of any claim or action in the state or federal courts. Yes

(14) We certify that construction of the Project has not commenced as of the application deadline set forth in the NOFA. Yes

(19) The STI Project will not result in the loss or conversion of agricultural or other working lands, or natural resource lands for other uses according the Dept. of Conservation's Farmland Mapping and Monitoring Program (FMMP) website? Yes

If "Yes", provide documentation the STI Project site is not within land designated as agricultural land per the FMMP tool.

File Name STI No Ag Demonstrate the STI site is not within land designated as agricultural land per FMMP tool. Uploaded to HCD? Yes

If "No", demonstrate that the AHD Project site qualifies as an Infill Site (as defined in Appendix A):

File Name STI Ag Infill Applicants seeking an exemption to the FMMP determination must demonstrate that the STI site qualifies as an Infill Site (as defined in Appendix A). Uploaded to HCD? N/A

(21)(A) If approval by a local public works department, or other responsible local agency is required for the Project, provide document below. I certify that the STI improvements are consistent with all applicable local rules, regulations, codes, policies and plans enforced or implemented by that entity. Yes

File Name STI Local Approvals Statement from entity indicating the STI Capital Project is consistent with all applicable local rules, regulations, codes, policies and plans enforced or implemented by that entity. Uploaded to HCD? Yes

(21)(B) If STI Project involves demolition of existing units affordable to lower income households, the application must demonstrate the replacement of demolished units, comparable in size, of equal or greater affordability, and equal to or greater than the number of the demolished affordable units located within comparable access to transit and include first right of return to displaced residents. These no net loss requirements (§106(a)(20)(C)) apply where an STI Project is proposed on any property which includes a parcel or any portion of a parcel on which residential dwelling units affordable to lower income households currently exist or where there have been dwelling units restricted to lower-income households which have been vacated or demolished within the five year period preceding the application. Explain below how this requirement is satisfied in the replacement affordable housing development. If Project does not involve demolition or rehabilitation of existing affordable units, please indicate "N/A".

STI Milestones	
Please provide the actual or anticipated completion date for the following performance milestones for each applicable Capital Project. If a milestone is not applicable to a Capital Project, please enter "N/A"	
Note: It is acknowledged that some of the following milestones may have already been achieved. For those milestones which have previously been met, 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.	
Capital Project Milestone Schedule	Date

Balboa Reservoir Sustainable Transportation Infrastructure (STI) PIN 47683	
Executed binding agreement between the Recipient and developer of the proposed development detailing the terms and conditions of the Project development	4/27/21
Site Control of site(s) by proposed developer.	6/8/21
Completion of all necessary environmental clearances, including those required under CEQA and NEPA.	N/A
Obtaining all necessary and discretionary public land use approvals.	6/24/10
Submission of Final Construction Drawings and Specifications to the appropriate local permitting authority.	N/A
Commencement of construction.	N/A
Construction completion and closeout.	12/8/21
Program funds fully disbursed.	6/30/23
	11/30/27
<i>Have all milestone dates been entered above?</i>	
	Yes

Balboa Reservoir Sustainable Transportation Infrastructure (STI) Sources and Uses Budget PIN 47683

4/27/21

If proposing multiple distinct STI Capital Projects, provide detail for each Project in separate budgets below. Amounts from each budget will autosum at the bottom. The sum will be used to determine the total STI funds requested and cost cap.

Cost Category	ALL FUNDING SOURCES											Comments
	AHSC STI Grant	FTA Formula Funds	0	0	0	0	0	0	0	0	Sources Total	
STI BUDGET #1 - Purchase of 2 BART Rail Cars												
Environmental review/studies											\$0	
Plan Specification and Estimates											\$0	
Right of way support costs											\$0	
Site or right of way acquisition for Cap. Improvement Project											\$0	
Other Soft Costs (Specify):											\$0	
Other Soft Costs (Specify):											\$0	
Other Soft Costs (Specify):											\$0	
Other Soft Costs (Specify):											\$0	
Total Soft Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Clearing and Grubbing											\$0	
Demolition											\$0	
Grading											\$0	
Soil Stabilization (Lime, etc.)											\$0	
Erosion/Weed Control											\$0	
Dewatering											\$0	
Other Site Preparation (Specify):											\$0	
Total Site Preparation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Sanitary Sewer											\$0	
Irrigation											\$0	
Storm Drain											\$0	
Detention Basin/Culverts											\$0	
Other Site Utilities (Specify):											\$0	
Total Site Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Aggregate Base											\$0	
Asphalt Pavement											\$0	
Sidewalk, Curb and Gutter											\$0	
Street Lights											\$0	
Striping/Barricades (Bicycle Facilities)											\$0	
Signage											\$0	
Crossing and Traffic Signals											\$0	
Roundabouts, median islands or curb extensions											\$0	
Other traffic calming surface improvements											\$0	
Other Complete Street Improvements (Specify):											\$0	
Other Complete Street Improvements (Specify):											\$0	
Total Complete Streets Improvements - Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Striping/Barricades (for dedicated bus lanes)											\$0	
Sidewalk, Curb and Gutter											\$0	
Street Lights											\$0	
Signage											\$0	
Signaling Prioritization Technology											\$0	
Boarding infrastructure											\$0	
Seating/Benches											\$0	
Bus/Transit Shelters											\$0	
Vehicles	\$5,034,634	\$1,633,754									\$6,668,388	
Other ITS Technology											\$0	
Other Transit and Station Areas (Specify):											\$0	
Other Transit and Station Areas (Specify):											\$0	
Total Transit and Station Areas - Construction	\$5,034,634	\$1,633,754	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$6,668,388	
Urban Greening (Specify):											\$0	
Urban Greening (Specify):											\$0	
Urban Greening (Specify):											\$0	
Total Urban Greening	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Provide Name of Impact Fee											\$0	
Provide Name of Impact Fee											\$0	
Total Impact Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other Activity Costs (Specify):											\$0	

Balboa Reservoir Sustainable Transportation Infrastructure (STI) Sources and Uses Budget PIN 47683

4/27/21

If proposing multiple distinct STI Capital Projects, provide detail for each Project in separate budgets below. Amounts from each budget will autosum at the bottom. The sum will be used to determine the total STI funds requested and cost cap.

Cost Category	ALL FUNDING SOURCES											Comments
	AHSC STI Grant	FTA Formula Funds	0	0	0	0	0	0	0	0	Sources Total	
Other Activity Costs (Specify):											\$0	
Total Activity Delivery Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Transit Operations for service expansion §103(a)(3)(A)(v)											\$0	
Employee Reporting											\$0	
Other Capital Asset Costs (Specify):											\$0	
Total Other Capital Asset Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total STI #1 Budgeted Project Costs	\$5,034,634	\$1,633,754	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$6,668,388	

Provide Urban Greening Details and explain unusual or extraordinary circumstances that have resulted in higher than expected Project costs; provide a justification as to why these costs are reasonable.

STI BUDGET #2 - Active Transportation

Environmental review/studies											\$0	
Plan Specification and Estimates											\$0	
Right of way support costs											\$0	
Site or right of way acquisition for Cap. Improvement Project											\$0	
Other Soft Costs (Specify):											\$0	
Other Soft Costs (Specify):											\$0	
Other Soft Costs (Specify):											\$0	
Other Soft Costs (Specify):											\$0	
Total Soft Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Clearing and Grubbing											\$0	
Demolition											\$0	
Grading											\$0	
Soil Stabilization (Lime, etc.)											\$0	
Erosion/Weed Control											\$0	
Dewatering											\$0	
Other Site Preparation (Specify):											\$0	
Total Site Preparation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Sanitary Sewer											\$0	
Irrigation											\$0	
Storm Drain											\$0	
Detention Basin/Culverts											\$0	
Other Site Utilities (Specify):											\$0	
Total Site Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Aggregate Base											\$0	
Asphalt Pavement	\$15,690										\$15,690	
Sidewalk, Curb and Gutter	\$1,471,110										\$1,471,110	
Street Lights											\$0	
Striping/Barricades (Bicycle Facilities)											\$0	
Signage											\$0	
Crossing and Traffic Signals	\$83,371										\$83,371	
Roundabouts, median islands or curb extensions											\$0	
Other traffic calming surface improvements											\$0	
Other Complete Street Improvements : caulking and painting	\$26,260										\$26,260	
Other Complete Street Improvements (Specify): Temporary elect.	\$14,593										\$14,593	
Total Complete Streets Improvements - Construction	\$1,611,024	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,611,024	
Striping/Barricades (for dedicated bus lanes)											\$0	
Sidewalk, Curb and Gutter											\$0	
Street Lights											\$0	
Signage											\$0	
Signaling Prioritization Technology											\$0	
Boarding infrastructure											\$0	
Seating/Benches											\$0	
Bus/Transit Shelters											\$0	
Vehicles											\$0	
Other ITS Technology											\$0	
Other Transit and Stationing Areas (Specify):											\$0	

Balboa Reservoir Sustainable Transportation Infrastructure (STI) Sources and Uses Budget PIN 47683

4/27/21

If proposing multiple distinct STI Capital Projects, provide detail for each Project in separate budgets below. Amounts from each budget will autosum at the bottom. The sum will be used to determine the total STI funds requested and cost cap.

Cost Category	ALL FUNDING SOURCES											Comments	
	AHSC STI Grant	FTA Formula Funds	0	0	0	0	0	0	0	0	0		Sources Total
Other Transit and Station Areas (Specify):												\$0	
Total Transit and Station Areas - Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Urban Greening (Specify): Tree planting, top soil, irrigation	\$975,660											\$975,660	
Urban Greening (Specify):												\$0	
Urban Greening (Specify):												\$0	
Total Urban Greening	\$975,660	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$975,660	
Provide Name of Impact Fee												\$0	
Provide Name of Impact Fee												\$0	
Total Impact Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other Activity Costs (Specify): General Conditions, O&P	\$367,617											\$367,617	
Other Activity Costs (Specify):												\$0	
Total Activity Delivery Costs	\$367,617	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$367,617	
Transit Operations for service expansion §103(a)(3)(A)(v)												\$0	
Employee Reporting												\$0	
Other Capital Asset Costs (Specify):												\$0	
Total Other Capital Asset Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total STI #2 Budgeted Project Costs	\$2,954,301	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,954,301	

Provide Urban Greening Details and explain unusual or extraordinary circumstances that have resulted in higher than expected Project costs; provide a justification as to why these costs are reasonable.

STI BUDGET #3 -

Environmental review/studies												\$0	
Plan Specification and Estimates												\$0	
Right of way support costs												\$0	
Site or right of way acquisition for Cap. Improvement Project												\$0	
Other Soft Costs (Specify):												\$0	
Other Soft Costs (Specify):												\$0	
Other Soft Costs (Specify):												\$0	
Other Soft Costs (Specify):												\$0	
Total Soft Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Clearing and Grubbing												\$0	
Demolition												\$0	
Grading												\$0	
Soil Stabilization (Lime, etc.)												\$0	
Erosion/Weed Control												\$0	
Dewatering												\$0	
Other Site Preparation (Specify):												\$0	
Total Site Preparation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Sanitary Sewer												\$0	
Irrigation												\$0	
Storm Drain												\$0	
Detention Basin/Culverts												\$0	
Other Site Utilities (Specify):												\$0	
Total Site Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Aggregate Base												\$0	
Asphalt Pavement												\$0	
Sidewalk, Curb and Gutter												\$0	
Street Lights												\$0	
Striping/Barricades (Bicycle Facilities)												\$0	
Signage												\$0	
Crossing and Traffic Signals												\$0	
Roundabouts, median islands or curb extensions												\$0	
Other traffic calming surface improvements												\$0	
Other Complete Street Improvements (Specify):												\$0	
Other Complete Street Improvements (Specify):												\$0	
Total Complete Streets Improvements - Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Striping/Barricades (for dedicated bus lanes)												\$0	

Balboa Reservoir Sustainable Transportation Infrastructure (STI) Sources and Uses Budget PIN 47683

4/27/21

If proposing multiple distinct STI Capital Projects, provide detail for each Project in separate budgets below. Amounts from each budget will autosum at the bottom. The sum will be used to determine the total STI funds requested and cost cap.

Cost Category	ALL FUNDING SOURCES											Comments	
	AHSC STI Grant	FTA Formula Funds	0	0	0	0	0	0	0	0	0		Sources Total
Sidewalk, Curb and Gutter												\$0	
Street Lights												\$0	
Signage												\$0	
Signaling Prioritization Technology												\$0	
Boarding infrastructure												\$0	
Seating/Benches												\$0	
Bus/Transit Shelters												\$0	
Vehicles												\$0	
Other ITS Technology												\$0	
Other Transit and Station Areas (Specify):												\$0	
Other Transit and Station Areas (Specify):												\$0	
Total Transit and Station Areas - Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Urban Greening (Specify):												\$0	
Urban Greening (Specify):												\$0	
Urban Greening (Specify):												\$0	
Total Urban Greening	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Provide Name of Impact Fee												\$0	
Provide Name of Impact Fee												\$0	
Total Impact Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other Activity Costs (Specify):												\$0	
Other Activity Costs (Specify):												\$0	
Total Activity Delivery Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other Activity Costs (Specify):												\$0	
Other Activity Costs (Specify):												\$0	
Total Activity Delivery Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Transit Operations for service expansion §103(a)(3)(A)(v)												\$0	
Employee Reporting												\$0	
Other Capital Asset Costs (Specify):												\$0	
Total Other Capital Asset Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total STI #3 Budgeted Project Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	

Provide Urban Greening Details and explain unusual or extraordinary circumstances that have resulted in higher than expected Project costs; provide a justification as to why these costs are reasonable.

TOTAL SUSTAINABLE TRANSPORTATION INFRASTRUCTURE (STI) BUDGET													
Total Soft Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Site Preparation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Site Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Complete Streets Improvements - Construction	\$1,611,024	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,611,024	
Total Transit and Station Areas - Construction	\$5,034,634	\$1,633,754	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$6,668,388	
Total Urban Greening	\$975,660	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$975,660	
Total Impact Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Activity Delivery Costs	\$367,617	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$367,617	
Total Other Capital Asset Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total STI Budgeted Project Costs	\$7,988,935	\$1,633,754	\$0	\$9,622,689									

TRA Project Summary

Project Name	Description (include: the general location and description of each TRA improvement)	Address	City	Zip	County	Census Tracts	APNs			
TRA #1	Next Generation Fare Gates at Balboa Park BART Station	BART will install 20 Next Generation Fare Gate consoles at Balboa Park BART Station as part of an effort to upgrade all fare gates throughout its system. BART's current fare gates are decades old and have proven ineffective in deterring fare evasion, which costs BART millions of dollars annually. The existing fare gates are also declining in reliability as they age. The Next Generation Fare Gate design incorporates a tall, swing-style gate with improved passenger throughput and maintainability, and a more modern appearance.	401 Geneva Ave	San Francisco	94112	San Francisco	6075031000			
	Latitude: 37.72627	Longitude: -112.454094	Select the primary transit mode supported by this TRA:			Heavy rail				
TRA #2	Street Lighting at Balboa Reservoir Campus	Installation of 10 street lights on the Balboa Reservoir campus	401 Geneva Ave	San Francisco	94112	San Francisco	6075031000			
	Latitude: 37.72627	Longitude: -112.454094	Select the primary transit mode supported by this TRA:			N/A				
TRA #3										
	Latitude:	Longitude:	Select the primary transit mode supported by this TRA:							
Enter # & Amt. of new:		Bus Shelters 0	AHSC Funds \$0	Bicycle Parking At Transit 0	AHSC Funds \$0	Bus Stop Benches 0	AHSC Funds \$0			
Safe and Accessible Walkways - length (in feet) of sidewalk directly improved (ex. provided shade to, illuminated)				2,419	Pedestrian Paths (linear feet)		0.0	Type Sidewalk		
# of Transit Routes Improved		8		Station Area or Transit Access Improvements		Yes Fare Gates				
ID all intended outcomes of proposed active transportation component:				Improved compliance with traffic laws		Other barriers that may have existed on route (describe below)				
Improved sight distance/visibility		Yes		Elimination of potential conflict points		Reduced vehicular speed/volume				
TRA Eligible Costs §103(a)(4) and Ineligible Costs §103(c)										
(B)(i) We certify the capital improvements in the TRA budget are publicly accessible and provide supportive amenities to cyclists, pedestrians, and transit riders (i.e. bike parking, bus shelter, benches, street trees, etc.) within the defined Project Area meeting the §102(c) or (d) transit requirements.								Yes		
(B)(ii) Total amount of eligible TRA soft costs cannot exceed 10% of the total AHSC Program award.				Budgeted \$0	Cost Cap \$2,958,549	Overage \$0	Ok			
(B)(iv) Total amount of Activity Delivery Costs associated with the implementation of the Capital Project cannot exceed 10% of the costs associated with the Capital Project.				\$0	\$269,814	\$0	Ok			
(B)(v) Capital Project costs in budget that are required as a condition of local approval for the TRA?				No If Yes, upload documentation below						
File Name	TRA Cap Project Costs	Documentation showing Capital Project costs are required as condition of local approval for TRA.				Uploaded to HCD?	N/A			
(C) Total combined requested grant amount for your STI Capital Projects and TRA Capital Projects cannot exceed \$10M?								Ok		
§103(c) We certify the AHSC TRA funded cost do not include any of the following ineligible costs:								Yes		
(1) Costs are not eligible if there is another feasible, available source of committed funding for the STI portion to be funded by AHSC or if the cost is incurred prior to the AHSC award;										
(2) Routine maintenance or operations of transportation infrastructure including the general transit fleet, not including maintenance or operations associated with AHSC funded transit service expansion, including expansion beyond service levels offered during the COVID-19 pandemic;										
(3) In lieu fees for local inclusionary housing programs;										
(4) Ongoing operational costs beyond the term of the grant (three years) for Program Costs;										
(5) All costs associated with automobile or motorcycle parking (excluding electric vehicle charging infrastructure);										
(6) Costs and fees associated with the ongoing provision of internet service.										
TRA Grant Terms §104(c)										
(1) We certify that the grant does not result in a profit that exceeds the commercially reasonable range for other improvements of similar size and level of risk.								Yes		
(2) We acknowledge that AHSC Program grant funds will be disbursed as reimbursed progress payments for eligible costs incurred after the execution of the Standard Agreement in the amount not to exceed the AHSC Program award of funds.								Yes		
(3) We acknowledge if the TRA Project includes multiple phases or developments, all entitlements and construction funding commitments for the first phase must be received prior to disbursement.								Yes		
TRA Threshold §106(a)										
(7) TRA Enforceable Funding Commitments (EFC): <i>see Appendix A (t) - for an explanation of Enforceable Funding Commitments (EFC).</i>										
EFC #	Committed by Full App Deadline?	Commitment Date	Source Name (listed in order of lien priority)	Source Type	Lien No.	Amount	Interest Rate	Term - # of months	Required Debt Service	Balloon ?
1	Yes		AHSC TRA Grant	State-HCD		\$1,732,406				
2	Yes	4/28/21	Federal Transit Administration Formula Grant Funds	Fed	N/A	\$764,335	N/A Grant	N/A	N/A	N/A
3	Yes	11/8/16	Regional Ballot Measure RR	Other	N/A	\$201,399	N/A Grant	N/A	N/A	N/A
4										
5										
6										
7										
8										
9										
10										
\$965,734		<Total Committed Non-AHSC TRA Funds		TOTAL (must equal TRA Budget Amt)		\$2,698,140				
Provide a description of unusual or extraordinary circumstances that have resulted in higher than expected Project costs and provide a justification as to why these costs are reasonable.										
File Name	EFC TRA1; EFC TRA2; EFC TRA3	Supporting documentation for the 2 non-AHSC TRA funding commitments.				Uploaded to HCD?	N/A			
(8)(A) Applicant acknowledges completion and approval or adoption of all necessary environmental clearances for transportation components must be attained by initial disbursement of grant funds.										
NEPA:	AHSC R6	Is Federal funding proposed that will trigger NEPA requirements?				If Yes, enter date of "Authority to Use Grant Funds"		7/29/10		

Balboa Reservoir Transportation Related Amenities (TRA) PIN 47683

4/27/21

CEQA: Project approved "by-right"? Is Project Categorically Exempt? Yes Negative Declaration Date: _____ Final EIR Date: _____

Discuss below any special NEPA and/or CEQA Special Circumstances or exemptions and provide estimated/actual completion dates of all necessary environmental clearances.

NEPA: TRA #1, the Next Generation Fare Gate project, qualified for categorical exclusion. The NEPA Class of Action is Class II(c), Type 07 (Acquisition or Maintenance of vehicles or equipment). Refer to 23 CFR § 771.118(c)(7). HUD 7015.16 is not applicable; Authority to use grant funds was granted as of 7/29/10, the date when the fare collection equipment project was included in the 2000 Transportation Improvement Program of the Metropolitan Transportation Commission. CEQA: The Next Generation Fare Gate project qualifies for categorical exclusion.

File Name	TRA Environmental	Copy of all environmental clearances (e.g. Environmental Impact Report) or Notice of Exemption.	Uploaded to HCD?	N/A
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File Name	TRA Auth to Use Grant Funds	For NEPA only, 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?	N/A
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(9) If applicable, provide a listing and status of all discretionary local land use entitlements and permits, excluding design review, required to complete each TRA Project that have been granted, submitted or to be applied for to the appropriate local agencies, or consistent with local planning documents.

Agency / Issuer	Land Use Approval Date	Approval Type	Comments

(11) Does applicant or Developer of Project have Site Control for each TRA Project? If yes, enter site control form and the most recent execution date below (Site Control Appendix A) Yes

Form of site control (See Site Control in Appendix A): **Fee Title** Most recent document execution date: _____

If leasehold estate: Rent based on restricted land value? Is acquisition cost \$0 in Dev. Budget? Prepaid lease loan used? If so answer (a-c) _____

(a) Funding amount based on the Present Value of lease payments? _____ (b) Lender requesting Res. Receipts (not permissible) (c) Has loan amount been entered as a finance cost?

Describe any special circumstances, e.g. if there are multiple TRA Projects provide site control information for each.

BART has site control for TRA #1, the Next Generation Fare Gate project.

File Name	TRA Site Control	Appropriate documentation to demonstrate the form of site control indicated above.	Uploaded to HCD?	Yes
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(12)(A) Applicants must demonstrate prior experience by providing evidence of two prior TRA projects similar to the proposed AHSC Project in scope and size, which have been completed by the applicant during the ten years preceding the application due date. May demonstrate the requisite experience by using past experience of work completed of a Locality or Transportation Agency non-applicant so long as the applicant can provide an executed agreement with that specific Locality or Transportation Agency for the completion of the TRA components of the AHSC Project for which funding is sought.

(12) Which applicant demonstrates the prior experience noted below: **Bridge Housing Corporation**

	TRA Past Project #1	TRA Past Project #2
Project Name	MacArthur BART Station Transit Village Plaza Improvements	Richmond Intermodal Improvement Project
Development Entity	San Francisco Bay Area Rapid Transit District (BART)	San Francisco Bay Area Rapid Transit District
Completion Date	12/1/19	12/1/15
Brief Description	MacArthur BART Station Transit Village Plaza Improvements, including plaza and frontage road improvements, including a redesign of the exterior public space at the entrance of the MacArthur BART station for a more context-sensitive design that improves the safety and circulation of the station area for BART patrons and the general public. The project improvements include a secure 200-space bike station and new hardscape, seating areas, bus shelters and lighting to improve the multimodal transfer waiting areas.	Included complete reconfiguration and reconstruction of bus intermodal including roadways, curb/gutter, sidewalks, curb ramps, storm water management, urban greening, and pedestrian scale lighting.

File Name	Past Exp TRA1, Past Exp TRA2	Where the party making improvements funded by AHSC in not a public entity, an executed agreement from a public agency certifying the satisfactory completion of similar infrastructure improvements.	Uploaded to HCD?	N/A
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(13) We certify as of the application date, the applicants or the TRA real property is not party to or the subject of any claim or action in the state or federal courts.

(14) We certify that construction of the Project has not commenced as of the application deadline set forth in the NOFA.

(19) The TRA Project will not result in the loss or conversion of agricultural or other working lands, or natural resource lands for other uses according the Dept. of Conservation's Farmland Mapping and Monitoring Program (FMMP) website?

If "Yes", provide documentation the TRA Project site is not within land designated as agricultural land per the FMMP tool.

File Name	TRA No Ag	Demonstrate TRA site is not within land designated as agricultural land per FMMP tool.	Uploaded to HCD?	Yes
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If "No", demonstrate that the AHD Project site qualifies as an Infill Site (as defined in Appendix A):

File Name	TRA Ag Infill	Applicants seeking an exemption to the FMMP determination must demonstrate that the TRA site qualifies as an Infill Site (as defined in Appendix A).	Uploaded to HCD?	N/A
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(21)(A) If approval by a local public works department, or other responsible local agency is required for the Project, provide document below. I certify that the TRA improvements are consistent with all applicable local rules, regulations, codes, policies and plans enforced or implemented by that entity. Yes

File Name	TRA Local Approvals	Statement from entity indicating the TRA Capital Project is consistent with all applicable local rules, regulations, codes, policies and plans enforced or implemented by that entity.	Uploaded to HCD?	Yes
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(21)(B) If the TRA Project involves demolition of existing units affordable to lower income households, the application must demonstrate the replacement of demolished units, comparable in size, of equal or greater affordability, and equal to or greater than the number of the demolished affordable units located within comparable access to transit and include first right of return to displaced residents. These no net loss requirements (§106(a)(20)(C)) apply where a TRA Project is proposed on any property which includes a parcel or any portion of a parcel on which residential dwelling units affordable to lower income households currently exist or where there have been dwelling units restricted to lower-income households which have been vacated or demolished within the five year period preceding the application.

TRA Milestones

Please provide the actual or anticipated completion date for the following performance milestones for each applicable Capital Project. If a milestone is not applicable to a Capital Project, please enter "N/A"

Note: It is acknowledged that some of the following milestones may have already been achieved. For those milestones which have previously been met, 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.

Capital Project Milestone Schedule	Date
Executed binding agreement between the Recipient and developer of the proposed development detailing the terms and conditions of the Project development.	6/8/21
Site Control of site(s) by proposed developer.	N/A
Completion of all necessary environmental clearances, including those required under CEQA and NEPA.	6/8/21
Obtaining all necessary and discretionary public land use approvals.	N/A
Submission of Final Construction Drawings and Specifications to the appropriate local permitting authority.	N/A
Commencement of construction.	7/1/24
Construction completion and closeout.	12/31/26
Program funds fully disbursed.	12/31/26

Have all milestone dates been entered above? Yes

Balboa Reservoir Transportation Related Amenities (TRA) Sources and Uses Budget PIN 47683

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If proposing multiple distinct TRA Capital Projects, provide detail for each Project in separate budgets below. Amounts from each budget will autosum at the bottom. The sum will be used to determine the total TRA funds requested and cost cap.

Cost Category	ALL FUNDING SOURCES											Comments
	AHSC TRA Grant	Federal Transit Administration Formula Grant Funds	Regional Ballot Measure RR	0	0	0	0	0	0	0	Sources Total	
TRA BUDGET #1 - Next Generation Fare Gates at Balboa Park BART Station												
Environmental review/studies											\$0	
Plan Specification and Estimates											\$0	
Right of way support costs											\$0	
Site or right of way acquisition for Cap. Improvement Project											\$0	
Design		\$276,923									\$276,923	
Prototype development & testing		\$62,937									\$62,937	
Procurement/Legal		\$50,350									\$50,350	
Other Soft Costs (Specify):											\$0	
Total Soft Costs	\$0	\$390,210	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$390,210	
Clearing and Grubbing											\$0	
Demolition											\$0	
Grading											\$0	
Soil Stabilization (Lime, etc.)											\$0	
Erosion/Weed Control											\$0	
Dewatering											\$0	
Other Site Preparation (Specify):											\$0	
Total Site Preparation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Sanitary Sewer											\$0	
Irrigation											\$0	
Storm Drain											\$0	
Detention Basin/Culverts											\$0	
Other Site Utilities (Specify):											\$0	
Total Site Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Aggregate Base											\$0	
Asphalt Pavement											\$0	
Sidewalk, Curb and Gutter											\$0	
Street Lights											\$0	
Striping/Barricades (Bicycle Facilities)											\$0	
Signage											\$0	
Crossing and Traffic Signals											\$0	
Roundabouts, median islands or curb extensions											\$0	
Other traffic calming surface improvements											\$0	
Other Street Improvements (Specify):											\$0	
Total Complete Streets Improvements - Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Striping/Barricades (for dedicated bus lanes)											\$0	
Sidewalk, Curb, and Gutter											\$0	
Street Lights											\$0	
Signage											\$0	
Signaling Prioritization Technology											\$0	
Boarding infrastructure											\$0	
Seating/Benches											\$0	
Bus/Transit Shelters											\$0	
Other ITS Technology											\$0	
Other Transit Station or Stop (Specify): Fare Gates - Material & La	\$1,300,000	\$147,552									\$1,447,552	
Other Transit Station or Stop (Specify): Fare Gates - Software Inte		\$226,573									\$226,573	
Total Transit Station or Stop - Construction	\$1,300,000	\$374,125	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,674,125	
Street Trees											\$0	
Bioswales											\$0	
Landscaping											\$0	
Other Urban Greening (Specify):											\$0	
Other Urban Greening (Specify):											\$0	
Total Urban Greening	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Street Furniture											\$0	
Bicycle Repair Kiosks											\$0	
Bicycle Storage or Parking											\$0	
Drinking Fountains											\$0	

Balboa Reservoir Transportation Related Amenities (TRA) Sources and Uses Budget PIN 47683

4/27/21

If proposing multiple distinct TRA Capital Projects, provide detail for each Project in separate budgets below. Amounts from each budget will autosum at the bottom. The sum will be used to determine the total TRA funds requested and cost cap.

Cost Category	ALL FUNDING SOURCES											Comments
	AHSC TRA Grant	Federal Transit Administration Formula Grant Funds	Regional Ballot Measure RR	0	0	0	0	0	0	0	Sources Total	
Other Amenities (Specify):											\$0	
Other Amenities (Specify):											\$0	
Total Amenities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Provide Name of Impact Fee											\$0	
Provide Name of Impact Fee											\$0	
Total Impact Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other Activity Costs (Specify): Project Management			\$201,399								\$201,399	
Other Activity Costs (Specify):											\$0	
Total Activity Delivery Costs	\$0	\$0	\$201,399	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$201,399	
Employee Reporting											\$0	
Vehicles											\$0	
Other Capital Costs (Specify):											\$0	
Other Capital Costs (Specify):											\$0	
Total Other Capital Asset Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total TRA #1 Budgeted Project Costs	\$1,300,000	\$764,335	\$201,399	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,265,734	

Provide Urban Greening Details and explain unusual or extraordinary circumstances that have resulted in higher than expected Project costs; provide a justification as to why these costs are reasonable.

TRA BUDGET #2 - Street Lighting at Balboa Reservoir Campus

Environmental review/studies											\$0	
Plan Specification and Estimates											\$0	
Right of way support costs											\$0	
Site or right of way acquisition for Cap. Improvement Project											\$0	
Other Soft Costs (Specify):											\$0	
Other Soft Costs (Specify):											\$0	
Other Soft Costs (Specify):											\$0	
Other Soft Costs (Specify):											\$0	
Total Soft Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Clearing and Grubbing											\$0	
Demolition											\$0	
Grading											\$0	
Soil Stabilization (Lime, etc.)											\$0	
Erosion/Weed Control											\$0	
Dewatering											\$0	
Other Site Preparation (Specify):											\$0	
Total Site Preparation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Sanitary Sewer											\$0	
Irrigation											\$0	
Storm Drain											\$0	
Detention Basin/Culverts											\$0	
Other Site Utilities (Specify):											\$0	
Total Site Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Aggregate Base											\$0	
Asphalt Pavement											\$0	
Sidewalk, Curb and Gutter											\$0	
Street Lights											\$0	
Striping/Barricades (Bicycle Facilities)											\$0	
Signage											\$0	
Crossing and Traffic Signals											\$0	
Roundabouts, median islands or curb extensions											\$0	
Other traffic calming surface improvements											\$0	
Other Street Improvements (Specify):											\$0	
Total Complete Streets Improvements - Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Striping/Barricades (for dedicated bus lanes)											\$0	
Sidewalk, Curb, and Gutter											\$0	
Street Lights	\$348,300										\$348,300	
Signage	\$30,300										\$30,300	

Balboa Reservoir Transportation Related Amenities (TRA) Sources and Uses Budget PIN 47683

4/27/21

If proposing multiple distinct TRA Capital Projects, provide detail for each Project in separate budgets below. Amounts from each budget will autosum at the bottom. The sum will be used to determine the total TRA funds requested and cost cap.

Cost Category	ALL FUNDING SOURCES											Comments	
	AHSC TRA Grant	Federal Transit Administration Formula Grant Funds	Regional Ballot Measure RR	0	0	0	0	0	0	0	0		Sources Total
Signaling Prioritization Technology												\$0	
Boarding infrastructure												\$0	
Seating/Benches												\$0	
Bus/Transit Shelters												\$0	
Other ITS Technology												\$0	
Other Transit Station or Stop (Specify):												\$0	
Other Transit Station or Stop (Specify):												\$0	
Total Transit Station or Stop - Construction	\$378,600	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$378,600	
Street Trees												\$0	
Bioswales												\$0	
Landscaping												\$0	
Other Urban Greening (Specify):												\$0	
Other Urban Greening (Specify):												\$0	
Total Urban Greening	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Street Furniture												\$0	
Bicycle Repair Kiosks												\$0	
Bicycle Storage or Parking												\$0	
Drinking Fountains												\$0	
Other Amenities (Specify):												\$0	
Other Amenities (Specify):												\$0	
Total Amenities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Provide Name of Impact Fee												\$0	
Provide Name of Impact Fee												\$0	
Total Impact Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other Activity Costs (Specify):												\$0	
Other Activity Costs (Specify):												\$0	
Total Activity Delivery Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Employee Reporting												\$0	
Vehicles												\$0	
Other Capital Costs (Specify): General Conditions and O&P	\$53,806											\$53,806	
Other Capital Costs (Specify):												\$0	
Total Other Capital Asset Costs	\$53,806	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$53,806	
Total TRA #2 Budgeted Project Costs	\$432,406	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$432,406	

Provide Urban Greening Details and explain unusual or extraordinary circumstances that have resulted in higher than expected Project costs; provide a justification as to why these costs are reasonable.

TRA BUDGET #3 -

Environmental review/studies												\$0	
Plan Specification and Estimates												\$0	
Right of way support costs												\$0	
Site or right of way acquisition for Cap. Improvement Project												\$0	
Other Soft Costs (Specify):												\$0	
Other Soft Costs (Specify):												\$0	
Other Soft Costs (Specify):												\$0	
Other Soft Costs (Specify):												\$0	
Total Soft Costs	\$0												
Clearing and Grubbing												\$0	
Demolition												\$0	
Grading												\$0	
Soil Stabilization (Lime, etc.)												\$0	
Erosion/Weed Control												\$0	
Dewatering												\$0	
Other Site Preparation (Specify):												\$0	
Total Site Preparation	\$0												
Sanitary Sewer												\$0	
Irrigation												\$0	
Storm Drain												\$0	

Balboa Reservoir Transportation Related Amenities (TRA) Sources and Uses Budget PIN 47683

4/27/21

If proposing multiple distinct TRA Capital Projects, provide detail for each Project in separate budgets below. Amounts from each budget will autosum at the bottom. The sum will be used to determine the total TRA funds requested and cost cap.

Cost Category	ALL FUNDING SOURCES											Comments
	AHSC TRA Grant	Federal Transit Administration Formula Grant Funds	Regional Ballot Measure RR	0	0	0	0	0	0	0	Sources Total	
Detention Basin/Culverts											\$0	
Other Site Utilities (Specify):											\$0	
Total Site Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Aggregate Base											\$0	
Asphalt Pavement											\$0	
Sidewalk, Curb and Gutter											\$0	
Street Lights											\$0	
Striping/Barricades (Bicycle Facilities)											\$0	
Signage											\$0	
Crossing and Traffic Signals											\$0	
Roundabouts, median islands or curb extensions											\$0	
Other traffic calming surface improvements											\$0	
Other Street Improvements (Specify):											\$0	
Total Complete Streets Improvements - Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Striping/Barricades (for dedicated bus lanes)											\$0	
Sidewalk, Curb, and Gutter											\$0	
Street Lights											\$0	
Signage											\$0	
Signaling Prioritization Technology											\$0	
Boarding infrastructure											\$0	
Seating/Benches											\$0	
Bus/Transit Shelters											\$0	
Other ITS Technology											\$0	
Other Transit Station or Stop (Specify):											\$0	
Other Transit Station or Stop (Specify):											\$0	
Total Transit Station or Stop - Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Street Trees											\$0	
Bioswales											\$0	
Landscaping											\$0	
Other Urban Greening (Specify):											\$0	
Other Urban Greening (Specify):											\$0	
Total Urban Greening	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Street Furniture											\$0	
Bicycle Repair Kiosks											\$0	
Bicycle Storage or Parking											\$0	
Drinking Fountains											\$0	
Other Amenities (Specify):											\$0	
Other Amenities (Specify):											\$0	
Total Amenities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Provide Name of Impact Fee											\$0	
Provide Name of Impact Fee											\$0	
Total Impact Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other Activity Costs (Specify):											\$0	
Other Activity Costs (Specify):											\$0	
Total Activity Delivery Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Employee Reporting											\$0	
Vehicles											\$0	
Other Capital Costs (Specify):											\$0	
Other Capital Costs (Specify):											\$0	
Total Other Capital Asset Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total TRA #3 Budgeted Project Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	

Provide Urban Greening Details and explain unusual or extraordinary circumstances that have resulted in higher than expected Project costs; provide a justification as to why these costs are reasonable.

TOTAL TRANSPORTATION RELATED AMENITIES (TRA) BUDGET											
Total Soft Costs	\$0	\$390,210	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$390,210
Total Site Preparation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Balboa Reservoir Transportation Related Amenities (TRA) Sources and Uses Budget PIN 47683

4/27/21

If proposing multiple distinct TRA Capital Projects, provide detail for each Project in separate budgets below. Amounts from each budget will autosum at the bottom. The sum will be used to determine the total TRA funds requested and cost cap.

Cost Category	ALL FUNDING SOURCES										Sources Total	Comments
	AHSC TRA Grant	Federal Transit Administration Formula Grant Funds	Regional Ballot Measure RR	0	0	0	0	0	0	0		
Total Site Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Complete Streets Improvements - Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Transit Station or Stop - Construction	\$1,678,600	\$374,125	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,052,725	
Total Urban Greening	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Amenities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Impact Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Activity Delivery Costs	\$0	\$0	\$201,399	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$201,399	
Total Other Capital Asset Costs	\$53,806	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$53,806	
Total TRA Budgeted Project Costs	\$1,732,406	\$764,335	\$201,399	\$0	\$2,698,140							

PGM Project Summary §103(b)(1)

Programs include education, outreach and training programs for Active Transportation or transit ridership; air pollution exposure reduction; workforce development partnerships; and outreach, education, and subsidy to low-income residents for ZEV car sharing.

See cell comments.
Complete all yellow cells for each Program.

		Program Description	Address	City	Zip	County
PGM #1	Transit Ridership	Each of the 87 restricted units will be provided with one (1) discounted pass priced at no more than half of retail cost, for three years. Each card or pass will have a minimum value of 40 average commute length rides a month as determined by the transit agency.		San Francisco	94112	San Francisco
	Transit Passes for Residents					
Latitude: 37.72627		Longitude: -122.454094	Select the Program Cost Type §103(b)(1): Program Creation			
PGM #2	Workforce Dev.	GRID Alternatives will extend our successful solar training program for up to 20 project area residents. The solar training is a comprehensive program that provides trainees with both virtual and hands-on solar installation learning opportunities with particular focus on the most competitive skills to land jobs in the solar and related construction industries. Trainees receive certificates of completion as well as receive soft skills training such as resume writing and completing job applications. We introduce each trainee to hiring employers at the end of the program, too.		San Francisco	94112	San Francisco
	GRID Alternatives					
Latitude: 37.72627		Longitude: -122.454094	Select the Program Cost Type §103(b)(1): Program Expansion			
PGM #3						
Latitude:		Longitude:	Select the Program Cost Type §103(b)(1):			

PGM Eligible Costs §103(b) and Ineligible Costs §103(c) - eligible costs may include operational costs for programs for the term of the grant (3 years)

(1) Program Costs in Project include: Both Program creation and Expansion of existing programs to serve new populations or offer new program service and implementation
Please briefly describe how the Program Operator will sustain the Program beyond the term of the AHSC standard agreement and funds.
GRID has successfully funded their workforce development programs through a diversity of corporate and foundation grants as well as through fee-for-service projects. Our program has received funding from financial institution partnerships, such as Wells Fargo and state grants such as the State of California Community Reinvestment Grants, as well as foundation funding from groups like the Sills Family Foundation.

	Budgeted less required transit passes/cards	Cost Cap	Overage	
(2) Total grant amount for Program Costs within a Project Area cannot exceed 30% of the funding request for the overall Project up to \$500,000 not including required transit passes/cards described in §106(a).	\$100,012	\$500,000	\$0	Ok

§103(c) We certify the AHSC PGM funded costs do not include any of the following ineligible costs:
 (1) Costs are not eligible if there is another feasible, available source of committed funding for STI portion thereof to be funded by AHSC or if cost is incurred prior to AHSC award;
 (2) Routine maintenance or operations of transportation infrastructure including the general transit fleet, not including maintenance or operations associated with AHSC funded transit service expansion, including expansion beyond service levels offered during the COVID-19 pandemic;
 (3) In lieu fees for local inclusionary housing programs;
 (4) Ongoing operational costs beyond the term of the grant (three years) for Program Costs;
 (5) Costs associated with automobile or motorcycle parking (excluding electric vehicle charging infrastructure);
 (6) Costs and fees associated with the ongoing provision of internet service.

PGM Threshold §106(a)

(7) PGM Enforceable Funding Commitments (EFC) See AHSC Guidelines Appendix A - Definitions for an explanation of Enforceable Funding Commitments (EFC).

EFC #	Committed by Full App Deadline?	Commitment Date	Source Name (listed in order of lien priority)	Source Type	Lien No.	Amount	Interest Rate		Term - # of months	Required Debt Service	Balloon ?
							Rate	Type			
1	Yes		AHSC PGM Grant	State-HCD		\$253,741	Transit Passes will not contribute to \$500k AHSC PGM cap.				
2											
3											
4											
5											
6											
7											
8											
9											
10											
\$0		<Total Committed Non-AHSC PGM Funds	TOTAL (must equal PGM Budget			\$253,741					

Provide a description of unusual or extraordinary circumstances that have resulted in higher than expected Project costs and provide a justification as to why these costs are reasonable.

File Name | EFC PGM1, EFC PGM2, EFC PGM3 | Supporting documentation for the 0 non-AHSC PGM funding commitments. | Uploaded to HCD? | N/A

(12) Demonstrate prior experience by providing evidence of two prior PGM projects similar to the proposed AHSC Project in scope and size, which have been completed by the applicant

(12) Which applicant demonstrates the prior experience noted below: Bridge Housing Corporation

	PGM Past Project #1	PGM Past Project #2
Project Name	Ironhorse at Central Station	Installation Basics Training 200 Program
Operating Entity	BRIDGE Housing Corporation	GRID Alternatives

Balboa Reservoir Programs (PGM) PIN 47683

4/27/21

Brief Description	Ironhorse at Central Station was developed by BRIDGE Housing in 2011 and provides 99 affordable family apartments. The project stands at the center of Central Station, an exciting reintegration of approximately 29 acres of unused industrial land into the surrounding residential neighborhood in West Oakland.	Multi-year funded program through the California Community Reinvestment Grant program to provide solar installation training and job placement
--------------------------	--	--

Describe the prior experience of the Program Operator with operating similar successful programs.	AC Transit EasyPasses have been purchased annually for the property since it's construction completion in 2011. One pass is provided per unit (99 units), plus one pass is provided to a designated member of the property's Management Office (100 passes total). Passes may be utilized for unlimited usage on all AC Transit local and Transbay buses. The development is located in an AC Transit Level of Transit Service (LTS) area 4 and each discounted pass is available for approximately \$103.50 each. Passes will be provided to	This project addresses the issue of unemployment and recidivism in communities of concern, in particular with low-income individuals, people of color and the formerly incarcerated, through our 200-hour Installation Basics Training program (IBT-200), which provides low-income job seekers with intensive, skills-based training to successfully launch careers in solar and related construction sectors. This program provides up to 50 trainees in our IBT-200 program in San Joaquin, Sacramento and Butte County during the grant period.
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(22) We certify the PGM is infeasible without AHSC Program funds, and other committed funds are not and will not be supplanted by AHSC Program funds. Yes

Program Need and Readiness

Please briefly describe the proposed Program(s) Activity

GRID will extend our successful solar training program for up to 20 project area residents. The solar training is a comprehensive program that provides trainees with both virtual and hands-on solar installation learning opportunities with particular focus on the most competitive skills to land jobs in the solar and related construction industries. Trainees receive certificates of completion as well as receive soft skills training such as resume writing and completing job applications. We introduce each trainee to hiring employers at the end of the program, too. GRID's solar training program is a low-barrier design, meeting trainees "where they are at" and no previous experience is required.

Who are the targeted users for the Program(s)?

Low-income residents and those from underserved communities with barriers to employment, such as re-entry citizens or those with economic hardships that have kept them from professional development in the trades and/or education, particularly in communities of color. Unemployment is high in these communities due to factors such as historic barriers resultant from systemic racism including educational barriers. Statewide, 87% of our participants identify as people of color.

Balboa Reservoir Programs (PGM) PIN 47683

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What is the issue or need that the Program(s) is attempting to address, and how will it successfully address this issue or need?

GRID Alternatives has a vision of a successful transition to clean, renewable energy that includes them. Environmental justice and social equity is core to GRID's mission- those that are most impacted by pollution, poverty and climate change should be among the first to benefit from investments in climate resiliency. An equitable transition means that the emerging clean energy economy should drive economic growth and environmental benefits into communities of concern. GRID's program does both: translating financial benefits of solar installation into direct monthly energy savings for low-income families living in impacted communities, and into solar jobs for unemployed and under-employed community members

Describe additional design challenges and development costs incurred to meet the requirements of the Program.

None

PGM Milestones

Please provide the actual or anticipated completion date for the following performance milestones for each. If a milestone is not applicable, select "N/A"

Program Milestone Schedule	Date
Program designed.	6/8/21
Program operator identified.	6/8/21
Obtaining all enforceable funding commitments.	6/8/21
Program operations start.	7/1/23
Identification and commitment of program operator and partners.	6/8/21
Completion of a business or a work plan.	6/8/21
Identification of ongoing support for operation costs beyond grant period.	6/8/21
Program funds fully disbursed	7/1/26
<i>Have all milestone dates been entered above?</i>	
	Yes

Balboa Reservoir Programs (PGM) Sources and Uses Budget PIN 47683

4/27/21

If proposing multiple distinct Programs, provide detail for each Program in the PGM worksheet and in separate budgets below. Amounts from each budget will autosum at the bottom. The sum will be used to determine the total PGM funds requested.

Cost Category	ALL FUNDING SOURCES											Sources Total	Comments	
	AHSC PGM Grant	0	0	0	0	0	0	0	0	0	0			
PGM BUDGET #1 - Transit Passes for Residents														
Direct Staff Cost 1 (Specify)													\$0	
Direct Staff Cost 2 (Specify)													\$0	
Direct Staff Cost 3 (Specify)													\$0	
Direct Staff Cost 4 (Specify)													\$0	
Direct Staff Cost 5 (Specify)													\$0	
Total Direct Staff Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other Indirect Staff Cost (Specify)													\$0	
Other Indirect Staff Cost (Specify)													\$0	
Other Indirect Staff Cost (Specify)													\$0	
Total Indirect Staff Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Staff Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Travel													\$0	
Equipment													\$0	
Required Transit Passes/Cards (see cell comment)	\$153,729												\$153,729	
Other Transit Passes													\$0	
Supplies (Specify)													\$0	
Supplies (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Total Other Capital Costs	\$153,729	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$153,729	
Total PGM #1 Budgeted Project Costs	\$153,729	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$153,729	
PGM BUDGET #2 - GRID Alternatives														
Direct Staff Cost 1 (Specify): Staff	\$52,960												\$52,960	
Direct Staff Cost 2 (Specify)													\$0	
Direct Staff Cost 3 (Specify)													\$0	
Direct Staff Cost 4 (Specify)													\$0	
Direct Staff Cost 5 (Specify)													\$0	
Total Direct Staff Costs	\$52,960	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$52,960	
Other Indirect Staff Cost (Specify)	\$9,092												\$9,092	
Other Indirect Staff Cost (Specify)													\$0	
Other Indirect Staff Cost (Specify)													\$0	
Total Indirect Staff Costs	\$9,092	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$9,092	
Total Staff Costs	\$62,052	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$62,052	
Travel	\$7,960												\$7,960	
Equipment													\$0	
Required Transit Passes/Cards (see cell comment)													\$0	
Other Transit Passes													\$0	
Supplies (Specify)													\$0	
Supplies (Specify)													\$0	
Other Capital Costs (Specify): Stipends	\$30,000												\$30,000	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Total Other Capital Costs	\$37,960	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$37,960	
Total PGM #2 Budgeted Project Costs	\$100,012	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$100,012	
PGM BUDGET #3 -														
Direct Staff Cost 1 (Specify)													\$0	
Direct Staff Cost 2 (Specify)													\$0	
Direct Staff Cost 3 (Specify)													\$0	
Direct Staff Cost 4 (Specify)													\$0	
Direct Staff Cost 5 (Specify)													\$0	
Total Direct Staff Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Other Indirect Staff Cost (Specify)													\$0	
Other Indirect Staff Cost (Specify)													\$0	
Other Indirect Staff Cost (Specify)													\$0	
Total Indirect Staff Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Staff Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Travel													\$0	
Equipment													\$0	
Required Transit Passes/Cards (see cell comment)													\$0	
Other Transit Passes													\$0	
Supplies (Specify)													\$0	
Supplies (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Other Capital Costs (Specify)													\$0	
Total Other Capital Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total PGM #3 Budgeted Project Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
TOTAL PROGRAM (PGM) BUDGET														
Total Direct Staff Costs	\$52,960	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$52,960	
Total Indirect Staff Costs	\$9,092	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$9,092	
Total Other Capital Costs	\$191,689	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$191,689	
Total PGM Budgeted Project Costs	\$253,741	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$253,741	

Balboa Reservoir Quantitative Policy Scoring §107 PIN 47683										4/27/21				
55 Points Max (points in blue shaded cells)										Total Quantitative Self Score	53.0			
Active Transportation Improvements §107(b) - 10 Points Max											10			
(1) Length of Context Sensitive Bikeways (PAM) - 2 points max														
Total length (in linear miles) of AHSC Funded Context Sensitive Bikeways (from STI worksheet):										0.53	2			
(2) Will Project link the AHD or Qualifying Transit Station or Stop to an existing bicycle network or a bicycle network identified in an official public planning document? The existing or planned bicycle network must be directly linked by a new AHSC funded Context Sensitive Bikeway that has an entry point within one quarter mile of either the AHD or Qualifying Transit Station or Stop. The existing or planned bicycle network does not have to be comprised of Context Sensitive Bikeways. - 1 point														
										Yes	1			
File Name	Bicycle Network Connectivity	Identify the Project component that links the AHD or Qualifying Transit Station or Stop to a bicycle network on the Transit Service Map (from Overview worksheet). Upload the official public planning document including map showing connectivity.							Uploaded to HCD?	Yes				
(3) Barriers to safe access of bicycle routes - 2 points max (one point for each)														
Select how Project will address safe access of routes:										Eliminate potential conflict points	Eliminate potential conflict points	2		
File Name	Safe Bicycle Routes	Provide one of the following: Traffic and safety studies that detail existing problems, existing traffic conditions and traffic projections from a Public Agency; photos of existing conditions that demonstrate existing problems with the bikeway; or a letter from a Public Agency that explains the current problems with the bikeway, and how the proposed improvement will fix it.							Uploaded to HCD?	Yes				
(4) Length of Safe and Accessible Walkways (PAM) - 2 points max														
Total length (in linear feet) of STI new or replaced sidewalks and TRA sidewalks improved (from STI & TRA worksheets):										4,838	2			
(5) Pedestrian Crossing point that directly links two pedestrian networks - 1 point														
Pedestrian crossing point within the Project Area that directly links two pedestrian networks that are unlinked for one quarter mile:										placement of new sidewalk	1			
File Name	Pedestrian Network Connectivity	PAM - identify a pedestrian crossing point that directly links two pedestrian networks that are unlinked for one quarter mile along a walkable route.							Uploaded to HCD?	Yes				
(6) Barriers to safe access of pedestrian routes - 2 points max (one point for each)														
Select how Project will address safe access of routes:										Eliminate potential conflict points	Eliminate potential conflict points	2		
File Name	Safe Pedestrian Routes	Provide one of the following: Traffic and safety studies that detail existing problems, existing traffic conditions and traffic projections from a Public Agency; photos of existing conditions that demonstrate existing problems with the walkway; or a letter from a Public Agency that explains the current problems with the walkway, and how the proposed improvement will fix it.							Uploaded to HCD?	Yes				
Green Buildings and Renewable Energy §107(c) - 10 Points Max											10			
(1) Green Building Status - 3 points										Construction Type: Residential Construction	3			
Green building status beyond State mandatory building code requirements as verified:										Green Point Rated New Construction: Gold				
File Name	Green Building Status	Provide signed letter from a certified LEED Green rater, certified Green Point rater, or licensed engineer stating the green building status.							Uploaded to HCD?	Yes				
(2) AHD or Mixed Use Development powered entirely through electricity - 7 points max														
Identify the Project's level of electric design:										Project will be powered entirely through electricity with no connections to natural gas infrastructure.	7			
File Name	Electric Design	Document the AHD or Mixed Use Development will contain the level of electricity stated above.							Uploaded to HCD?	Yes				
Housing and Transportation Collaboration §107(d) - 9 Points Max											8			
(1) STI Funds Requested as percentage of Total AHSC Requested - 6 points max														
AHD & HRI Requested:	\$19,610,404	STI Requested:	\$7,988,935	Total AHSC Funds Requested:	\$29,585,486	STI funds Requested as % of Total AHSC Requested:	27%	6						
(2) TRA Funds Requested (at or not at Transit Station or Stop) as percentage of Total AHSC Requested - 2 points max														
TRA Req:	\$1,732,406	TRA (Transit Station or Stop)	\$1,678,600	Total AHSC Funds Requested:	\$29,585,486	TRA (Transit Station/Stop) Funds Req as % of Total AHSC Req:	6%	TRA Funds Requested as % of Total AHSC Requested:	6%	2				
(3a) Funding from other Greenhouse Gas Reduction Fund (GGRF) Program, which directly benefit or contribute to Project's development - 1 point max or see (3b) below														
GGRF Program Project has received funding from:										Funding Amount:	0			
File Name	GGRF Fund Evidence	Provide proof of funding: Notice of Final award (must include amount of program funding awarded and date of award), or documentation detailing how the funds received from said Program will contribute to the development of the AHSC Project.							Uploaded to HCD?	N/A				
(3b) Within environmentally cleared High Speed Rail Station Planning Area - 1 point max														
Is Project within environmentally cleared High Speed Rail Station Planning Area?										No	0			
File Name	High Speed Rail Area	Document Project being within environmentally cleared High Speed Rail Station Planning Area.							Uploaded to HCD?	N/A				
Location Efficiency and Access to Destinations §107(e) - 6 Points Max											6.0			
(1) Location Efficiency - Walkability - 3 points max Enter Project address (or Project's center most point if no specific address) on US EPA Walkability Index to determine Walkability.														
Project address or corridor:										11 Frida Kahlo Way, San Francisco, CA 94112	Walkability Index: Most Walkable	3		
(2) Location Efficiency to Key Destinations (PAM) - .333 points each; 3 points max (for each item below, answer Yes or No as to if these Key Destinations are within 1/2 mile of the AHD)														
Grocery store-meets CalFresh requirements:	Yes	Licensed child care facility:	Yes	Public library:	Yes	Bank or Post Office:	Yes							
Medical clinic-accepts Medi-Cal payments:	No	Pharmacy:	Yes	Office park:	Yes	Place of Worship:	Yes	3.0						
Public elementary, middle or high school:	Yes	Park-accessible to general public:	No	University or junior college:	Yes									
Funds Leveraged §107(f) - 4 Points Max											3			
Non-AHSC Enforceable Funding Commitments (EFC):										\$54,263,169	AHSC Funds Requested:	\$29,585,486	Non-AHSC EFCs as a % of AHSC Requested:	183%
Anti-Displacement Strategies §107(g) - 6 Points Max											6			
(1) Projects that either implement strategies or programs, or are located in jurisdictions with policies, strategies or programs that currently exist to prevent the displacement of local community residents from the area surrounding the Project - 1 point per strategy - 4 points max										# of Strategies Implemented	4			
<i>Strategies Voluntarily Implemented by Applicant (select "Yes" for each strategy implemented). These Strategies must be funded by the AHSC Applicant.</i>														
Funding a community multi-lingual tenant legal counseling service. These funds do not need to be supplied by AHSC.										No				
Affirmative marketing strategies or plans targeting nearby neighborhoods, a Disadvantaged Community or a Low-Income Community.										No				
Funding a community based organization with a history of working in the local community to conduct displacement prevention work. These funds do not need to be supplied by AHSC. The application must include an executed agreement between the community based organization and applicant identifying the outcomes of the funded work.										No				
File Name	Community Based Org Agrmnt	Executed agreement between the community based organization and applicant identifying the outcomes of the funded work.							Uploaded to HCD?	N/A				
<i>Strategies Implemented by Local Jurisdiction (select "Yes" for each strategy implemented). These Strategies will only be awarded points if these policies are within local code or are ongoing programs of the local jurisdiction. All actions may only qualify for a single strategy. Strategies or programs must exceed State minimum standards. Local ordinances that match or exceed legal provisions such as tenant protection laws adopted in response to COVID-19 or those included under Government Code 66300 (Housing Crisis Act of 2019) may count for points in this section so long as they are not temporary.</i>														
Replacement requirements in targeted growth areas such as transit stations, transit corridors, job and housing rich areas, downtowns and revitalization areas or policies on sites identified pursuant to Gov. Code §65583.2(g)(3).														
Rent stabilization programs beyond what is required by California Civil Code 1946.2.										Yes				
Just cause eviction or other efforts improving tenant stability beyond what is required by California Civil Code 1946.2.										Yes				
Policies to preserve Single Room Occupancy (SRO) housing or mobile home parks.										Yes				
Condominium conversion restrictions.										Yes				

Balboa Reservoir Quantitative Policy Scoring §107 PIN 47683							4/27/21
Land banking programs actively receiving funding with a cumulative value of at least \$1,000,000. If Yes, provide details below.							
For each land banking program totalling at least \$1,000,000 in allocations, enter the program name followed by program type.							
Community benefit zoning and/or other land value recapture strategy.							
Rent review board and/or mediation, foreclosure assistance, or multi-lingual tenant legal counseling services.							
Policies to facilitate the development of new accessory dwelling units.							
Density bonus ordinances that expand on state replacement requirements							
File Name	Anti-Displacement Resident	Document each strategy or program and how it relates to the AHSC Project; how strategies exceed state requirements, if applicable; and who will implement any strategies under "Voluntarily Implemented by Applicants" and how they will do so.				Uploaded to HCD?	Yes
(2) Projects demonstrating policies, strategies or programs that either currently exist or will be implemented through this Project to prevent the displacement of locally-owned businesses from the area surrounding the Project. One point will be given for a policy, strategy, or program that either currently exists or is newly implemented through this Project. Two points will be given for two policies, strategies, or programs, either as one currently existing and one newly implemented through this Project, or both newly implemented through this Project. - 1 point per strategy - 2 points max						Number of Existing Strategies:	1
						Number of Newly Implemented Strategies:	1
							2
	Implementation of an overlay zone to protect and assist small businesses	Existing Strategy	Establishment of a small business advocate office and single point of contact for every small business owner				
	Creation and maintenance of a small business alliance	Will be Implemented	Increased visibility of the jurisdiction's small business assistance programs				
	Formal program to ensure that some fraction of a jurisdiction's purchases of goods and services come from local businesses		Prioritization of Minority and Women Business Enterprises (MWBE) for public contracting				
File Name	Anti-Displacement Business	Document who is responsible for each strategy, policy, or program claimed and include either a brief explanation or a web link to the Applicant/Local Jurisdiction's implementation or requirement of the strategy, policy, or program.				Uploaded to HCD?	Yes
Local Workforce Development & Hiring Practices §107(g) - 3 Points Max							3
(3) Projects that implement at least one workforce development strategy - 1.5 points per strategy, projects in which every AHSC project component cannot legally implement local hire or workforce development strategies must include an explanation detailing these barriers in order to receive full points.						# of Strategies	2
A. Funding workforce development organization that has a track record of success serving disadvantaged populations and can demonstrate significant job placement rates for trainees from Disadvantaged Communities.							Yes
File Name	Workforce Strategy A, B, C, D	Document each workforce development strategy including the name of the organization(s) they are partnering with, the demographic data on the population they serve, and a written agreement that details the partnership strategy or policy undertaken and its outcomes.				Uploaded to HCD?	Yes
B. Funding a partnership with a workforce development board that has a track record of success serving disadvantaged populations and can demonstrate significant job placement rates for trainees from Disadvantaged Communities.							
File Name	Workforce Development	Must submit program metrics detailing the demographics and numbers of individuals recruited, trained, and placed into state-certified apprenticeships or related jobs.				Uploaded to HCD?	
C. Project is bound by a Skilled and Trained workforce commitment.							
File Name	Skilled Workforce	A letter of intent letter of intent between the developer and the certified apprenticeship program outlining the mechanism to deliver on the term of that commitment.				Uploaded to HCD?	
D. Projects that have developed a Project labor or community workforce agreement.							
File Name	Workforce Agreement	Provide agreements, including a plan to pull a defined set of pre-apprentices from local programs with close and demonstrable connections to state-certified apprenticeships.				Uploaded to HCD?	
E. Projects that are located in jurisdictions with local hire ordinances that directly apply to the Project.							
File Name	Workforce Local Hires	Documentation of those requirements and a concrete plan to comply, including a specific number of targeted workers or apprenticeships to be hired, the mechanism for doing so, and the programs from which they will be pulled.				Uploaded to HCD?	Yes
Housing Affordability §107(h) - 5 Points Max							5
Total AHD Units Restricted to Extremely Low Income (ELI) Households:	26	Total AHD Units:	124	ELI Restricted AHD Units as a % of Total AHD Units:	21%		
Programs §107(i) - 2 Points Max							2
(1) AHSC Funded Eligible Program - 1 point							
Proposed Eligible Program:	Workforce Development Programs						1
(2) Applicant Provided Program Documentation - 1 point (if Yes, attach documentation)							
Program Operator will sustain the program beyond the term of the AHSC Program grant (three years)?							Yes
File Name	Program Continuation	Document showing how the Program Operator will sustain the program beyond the term of the AHSC Program grant (three years).				Uploaded to HCD?	Yes

Balboa Reservoir Narrative-Based Scoring §107(k)(l)(m)(n) - 15 Points Max PIN 47683			4/27/21	
For this section, applicants must include a PDF attachment of a write-up that addresses the following questions and prompts below and in the Guidelines. Please include the bolded headers listed below for each section of the write-up; the questions should not be re-stated in the write-up. The total write-up may not exceed six pages, not including required documentation, 11 point font minimum. Ensure that all relevant information for each section is included either in the response for that section, or the required documentation for that section.				
File Name	Narrative	Provide a response to each prompt listed below. Each prompt is designated by *Narrative. The responses must be uploaded as a PDF and must not exceed 6 pages. See Narrative Scoring Rubric document for guidance in completing Narratives.	Uploaded to HCD?	Yes
Collaboration & Planning - §107(k) - 4 Points				
(1) Local Planning Efforts *Narrative				
Identify what local planning efforts the Project implements, and if applicable, describe what particular components of the Project are derived from a local plan. Explain how local government agencies were involved in the process of creating the Project. Refer to Section 107(m)(1) of the Guidelines for further guidance.				
File Name	Local Planning Efforts	Indicate the applicable section or elements of the local planning document Project will implement.	Uploaded to HCD?	Yes
(2) Housing and Transportation Collaboration *Narrative				
Describe the relationship between the joint-applicants or partners that worked together to create the proposed AHSC Project. Explain the process involved in coming together to create a larger version for the Project Area (PAM). Describe the integration of housing, transportation, and urban greening infrastructure components in creating a cohesive Project.				
File Name	Site Plan & Project Map	Provide a site plan and Project area map (or context plan) detailing housing and transportation collaboration.	Uploaded to HCD?	Yes
Community Benefits & Engagement - §107(l) - 6 Points				
(1) Community Engagement and Leadership *Narrative				
Describe how community-based organizations and local residents have been meaningfully involved in the visioning and development of this Project. Explain in which stage(s) of the process community members and CBOs have been and will be engaged. Describe efforts to involve Disadvantaged and/or Low-Income Community residents, including how meetings were advertised and made accessible.				
File Name	Community Tracker	Provide a completed AHSC Round 6 Community Engagement Tracker.	Uploaded to HCD?	Yes
(2) Addressing Community Needs *Narrative				
Demonstrate how the proposed AHSC Project meets one or more identified community needs, articulating how these needs were identified (e.g. through the community engagement process, a local needs assessment, as part of a local health department plan or other city/county plan, etc.). Address community needs beyond the provisions of housing and transportation. For projects located in a Disadvantaged Community or Low-Income Community , applicants are also encouraged to cite top burdens from their CalEnviroScreen 3.0 score as community needs that their projects will address. For all Projects, applicants are encouraged to cite key factors contributing to less healthy community conditions from their Healthy Places Index score as community needs that their Project will address.				
File Name	Community Needs	Letter of support from local community-based, grassroots organization describing the community engagement process and how feedback from local residents was incorporated into the Project.	Uploaded to HCD?	Yes
Community Climate Resiliency - §107(m) - 3 Points				
(1) Climate Adaptation Assessment Matrix				
Fill out the Climate Adaptation Assessment Matrix (link below) with climate Projections for the listed impacts and with technical descriptions of adaptive measures to be employed. If the Project is considering climate Projections from data sources besides those listed below, state where the data are from and if they use different assumptions (e.g. time horizon).				
File Name	Climate Matrix	AHSC Round 6 Climate Adaptation Assessment Matrix.	Uploaded to HCD?	Yes
(2) Climate Adaptation *Narrative				
Describe how the risk posed from changing climate conditions will be reduced by strategies listed in the Climate Adaptation Assessment Matrix. Consider the lifetime of Project elements, risks posed by changing climate conditions, and consequences of those risks (impacts to occupant health and safety, structural integrity, heating and cooling systems, etc.). If your local city or county has added adaptation measures to the General Plan or other local planning documents, describe how the Project conforms to the implementation of that plan (Government Code section 65302(g)(4)), requires cities and counties to incorporate climate considerations in the Safety Element of the General Plan or other local plan or document by January 1, 2022). Separate responses according to climate impacts.				
Community Air Pollution Exposure Mitigation §107(n) - 2 Points Max				
(1) Air Pollution Exposure Mitigation Strategies *Narrative				
Air Pollution Exposure Mitigation Strategies: Identify pollutants of concern and/or known sources of pollution affecting the Project Area. Report the PM2.5, Diesel PM, Toxic Releases to Air, and Traffic Density percentiles as described in CalEnviroScreen 3.0 for the census tract in which the Project will be sited.* Describe how air pollution mitigation strategies are utilized in the design of the Project, how they were selected, and how they address pollution sources.				

Overview worksheet Uploads

FAAST FILE:	AB1550	Applicable CARB Priority Population Benefit Criteria Tables.	Uploaded to HCD?	Yes
FAAST FILE:	Project Area Map	Items marked with (PAM) in this application must be identified on the Project Area Map (PAM). This includes Quantitative Policy Scoring worksheet Active Transportation Improvements §107(b)(1), (4) & (5) and Location Efficiency and Access to Destinations §107(e)(2). Narrative Based Policy worksheet Collaboration & Planning §107(m)(2) must also be identified on the PAM. Refer to the Project Area Mapping Guidance.	Uploaded to HCD?	Yes
FAAST FILE:	Transit Service Map	Transit Service Map supporting the Qualifying Transit. Quantitative Policy Scoring worksheet Active Transportation Improvements §107(b)(2) must also be identified on the Map. Refer to the Project Area Mapping Guidance.	Uploaded to HCD?	Yes
FAAST FILE:	Transit Service Schedule	All documentation transit service schedule supporting the transit service area. All transit service schedules should be uploaded to "Transit Service Schedule" as one document.	Uploaded to HCD?	Yes
FAAST FILE:	MPO Support Doc	Document from MPO identified in cell Y9 above confirming consistency with SCS or similar sustainable planning document in non-MPO regions, per §106(a).	Uploaded to HCD?	Yes
FAAST FILE:	SCS or Equiv Regional Plan	Indicate the applicable section or elements of the SCS or equivalent regional plan detailing regional government involvement.	Uploaded to HCD?	Yes
FAAST FILE:	Reloc Plan	Applicants must provide a Relocation Plan or documentation supporting no relocation.	Uploaded to HCD?	Yes
FAAST FILE:	Hsng Element Letter	A jurisdiction's current housing element status is obtainable thru HCD's website	Uploaded to HCD?	Yes
FAAST FILE:	Indian Tribe	If applicable, for all Federally recognized Indian Tribe Applicants, upload documentation to support requirements as described in Appendix B.	Uploaded to HCD?	N/A
FAAST FILE:	STI TRA Agrmnt	If applicable, an applicant may provide an executed agreement with a specific Locality or transportation agency non-applicant for the completion of STI or TRA components for which funding is sought.	Uploaded to HCD?	Yes
FAAST FILE:	App1 Cert & Legal Disclosure	See Certifications & Legal worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App1 Resolution	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App1 OrgDoc1, App1 OrgDoc2, etc.	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App1 OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App1 Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App1 Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App1 FISCAL TIN FORM	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App1 Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	Yes
FAAST FILE:	App1 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	Yes
FAAST FILE:	App2 Cert & Legal Disclosure	See Certifications & Legal worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App2 Resolution	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App2 OrgDoc1, App2 OrgDoc2, etc.	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App2 OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App2 Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App2 Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App2 FISCAL TIN FORM	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	App2 Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	Yes
FAAST FILE:	App2 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	Yes
FAAST FILE:	App3 Cert & Legal Disclosure	See Certifications & Legal worksheet.	Uploaded to HCD?	
FAAST FILE:	App3 Resolution	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App3 OrgDoc1, App3 OrgDoc2, etc.	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App3 OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App3 Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App3 Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App3 FISCAL TIN FORM	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App3 Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	
FAAST FILE:	App3 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	
FAAST FILE:	App4 Cert & Legal Disclosure	See Certifications & Legal worksheet.	Uploaded to HCD?	
FAAST FILE:	App4 Resolution	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App4 OrgDoc1, App4 OrgDoc2, etc.	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App4 OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App4 Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App4 Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App4 FISCAL TIN FORM	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App4 Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	
FAAST FILE:	App4 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	
FAAST FILE:	App5 Cert & Legal Disclosure	See Certifications & Legal worksheet.	Uploaded to HCD?	
FAAST FILE:	App5 Resolution	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App5 OrgDoc1, App5 OrgDoc2, etc.	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App5 OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App5 Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App5 Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App5 FISCAL TIN FORM	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	App5 Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	
FAAST FILE:	App5 Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	
FAAST FILE:	Owner Cert & Legal	See Certifications & Legal worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	Owner Resolution	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	Owner OrgDoc1, OrgDoc2, etc...	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	Owner OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	Owner Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	Owner Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	Owner FISCAL TIN Form	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	Owner Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	Yes
FAAST FILE:	Owner Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	Yes
FAAST FILE:	AGP Cert & Legal	See Certifications & Legal worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	AGP Reso	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	AGP OrgDoc1, OrgDoc2, etc	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	AGP OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	Yes

FAAST FILE:	AGP Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	AGP Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	AGP TIN	See Applicant Documents worksheet.	Uploaded to HCD?	Yes
FAAST FILE:	AGP Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	Yes
FAAST FILE:	AGP Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	Yes
FAAST FILE:	Cert & Legal	See Certifications & Legal worksheet.	Uploaded to HCD?	
FAAST FILE:	Reso	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	OrgDoc1, OrgDoc2, etc	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	TIN	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	
FAAST FILE:	Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	
FAAST FILE:	Cert & Legal	See Certifications & Legal worksheet.	Uploaded to HCD?	
FAAST FILE:	Reso	Signature required; see Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	OrgDoc1, OrgDoc2, etc	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	OrgChart	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	Signature Block	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	Payee Data Record	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	TIN	See Applicant Documents worksheet.	Uploaded to HCD?	
FAAST FILE:	Cert of Good Standing	Dated 30 days or less from the application due date.	Uploaded to HCD?	
FAAST FILE:	Tax-Exempt Status	Evidence of tax-exempt status from IRS and from Franchise Tax Board for Corporations.	Uploaded to HCD?	
Certification and Legal				
FAAST FILE:	Cert & Legal Explanation	Letter of explanation for any "Yes" answers or red shaded items above.	Uploaded to HCD?	N/A
AHD-HRI				
FAAST FILE:	Net Density Verification	Letter and sealed site map certified by a California State-licensed professional (e.g., an engineer, surveyor, or landscape architect) confirming the net density.	Uploaded to HCD?	Yes
FAAST FILE:	Cap Improvements Req	Documentation from a Locality, transit agency or special district that capital improvements are required	Uploaded to HCD?	N/A
FAAST FILE:	SFH Lease Addendum	\$106(a)(5) Smoke Free Housing Lease Addendum, must be submitted prior to construction close.	Uploaded to HCD?	N/A
FAAST FILE:	AHD Environmental	Copy of all environmental clearances (e.g. Environmental Impact Report) or Notice of Exemption.	Uploaded to HCD?	Yes
FAAST FILE:	AHD Auth to Use Grant Funds	For NEPA only, 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
FAAST FILE:	AHD Market Study	Provide a completed market study prepared within one year of the application due date.	Uploaded to HCD?	Yes
FAAST FILE:	AHD Site Control	Appropriate documentation to demonstrate the form of site control indicated above.	Uploaded to HCD?	Yes
FAAST FILE:	AHD Preliminary Title Report	PTR, that is no more than 6 months old for the AHD Project.	Uploaded to HCD?	Yes
FAAST FILE:	Past Exp AHD1, Past Exp AHD2	Certificates of Occupancy for two recently completed affordable housing developments.	Uploaded to HCD?	Yes
FAAST FILE:	AHD No Ag	Demonstrate the AHD site is not within land designated as agricultural land per FMMP tool.	Uploaded to HCD?	Yes
FAAST FILE:	AHD Ag Infill	Applicants seeking an exemption to the FMMP determination must demonstrate that the AHD Project site qualifies as an Infill Site (as defined in Appendix A).	Uploaded to HCD?	N/A
FAAST FILE:	HRI Environmental	Copy of all environmental reports and clearances (e.g. EIR, Phase 1 Notice of Exemption).	Uploaded to HCD?	N/A
FAAST FILE:	HRI Auth to Use Grant Funds	For NEPA only, 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?	N/A
FAAST FILE:	HRI Market Study	Completed market study prepared within one year of the application due date.	Uploaded to HCD?	N/A
FAAST FILE:	HRI Site Control	Appropriate documentation to demonstrate the form of site control indicated above.	Uploaded to HCD?	N/A
FAAST FILE:	Past Exp HRI1, Past Exp HRI2	Certificates of Occupancy for two recently completed affordable housing developments.	Uploaded to HCD?	N/A
FAAST FILE:	HRI No Ag	Demonstrate the HRI site is not within land designated as agricultural land per FMMP tool.	Uploaded to HCD?	N/A
FAAST FILE:	HRI Ag Infill	Demonstrate that HRI Project site qualifies as an Infill Site (as defined in Appendix A).	Uploaded to HCD?	N/A
FAAST FILE:	HRI Local Approvals	Statement from entity indicating the HRI Capital Project is consistent with all applicable local rules, regulations, codes, policies and plans enforced or implemented by that entity.	Uploaded to HCD?	N/A
FAAST FILE:	Article XXXIV Attorney Opinion	Demonstrate legal requirements of Article XXXIV and relevant Project facts have been considered.	Uploaded to HCD?	Yes
FAAST FILE:	Article XXXIV Authority	Copy of document providing Authority.	Uploaded to HCD?	Yes
FAAST FILE:	Tax Credit Reservation	If the Project has already received a tax credit reservation, upload documentation.	Uploaded to HCD?	N/A
Max Funds & Unit Mix				
FAAST FILE:	Utility Allowance	Local housing authority document showing current utility allowance chart, with relevant components circled.	Uploaded to HCD?	Yes
Dev Sources				
FAAST FILE:	EFC AHD HRI1; EFC AHD HRI2; EFC AHD HRI3; etc.	Documentation for the 0 non-TCAC & non-AHSC AHD & HRI funding commitments.	Uploaded to HCD?	Yes
STI				
FAAST FILE:	STI Cap Project Costs	Documentation showing Capital Project costs are required as a condition of local approval for STI.	Uploaded to HCD?	N/A
FAAST FILE:	EFC STI1; EFC STI2; EFC STI3; etc.	Supporting documentation for the 0 non-AHSC STI funding commitments.	Uploaded to HCD?	Yes

FAAST FILE:	STI Environmental	Copy of all environmental clearances (e.g. Environmental Impact Report) or Notice of Exemption.	Uploaded to HCD?	N/A
FAAST FILE:	STI Auth to Use Grant Funds	For NEPA only, 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?	N/A
FAAST FILE:	STI Site Control	Appropriate documentation to demonstrate the form of site control indicated above.	Uploaded to HCD?	Yes
FAAST FILE:	Past Exp STI1, Past Exp STI2	Where the party making improvements funded by AHSC is not a public entity, an executed agreement from a public agency certifying the satisfactory completion of similar infrastructure improvements.	Uploaded to HCD?	Yes
FAAST FILE:	STI No Ag	Demonstrate the STI site is not within land designated as agricultural land per FMMP tool.	Uploaded to HCD?	Yes
FAAST FILE:	STI Ag Infill	Applicants seeking an exemption to the FMMP determination must demonstrate that the STI site qualifies as an Infill Site (as defined in Appendix A).	Uploaded to HCD?	N/A
FAAST FILE:	STI Local Approvals	Statement from entity indicating the STI Capital Project is consistent with all applicable local rules, regulations, codes, policies and plans enforced or implemented by that entity.	Uploaded to HCD?	Yes
TRA				
FAAST FILE:	TRA Cap Project Costs	Documentation showing Capital Project costs are required as condition of local approval for TRA.	Uploaded to HCD?	N/A
FAAST FILE:	EFC TRA1; EFC TRA2; EFC TRA3; etc.	Supporting documentation for the 0 non-AHSC TRA funding commitments.	Uploaded to HCD?	N/A
FAAST FILE:	TRA Environmental	Copy of all environmental clearances (e.g. Environmental Impact Report) or Notice of Exemption.	Uploaded to HCD?	N/A
FAAST FILE:	TRA Auth to Use Grant Funds	For NEPA only, 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?	N/A
FAAST FILE:	TRA Site Control	Appropriate documentation to demonstrate the form of site control indicated above.	Uploaded to HCD?	Yes
FAAST FILE:	Past Exp TRA1, Past Exp TRA2	Where the party making improvements funded by AHSC in not a public entity, an executed agreement from a public agency certifying the satisfactory completion of similar infrastructure improvements.	Uploaded to HCD?	N/A
FAAST FILE:	TRA No Ag	Demonstrate TRA site is not within land designated as agricultural land per FMMP tool.	Uploaded to HCD?	Yes
FAAST FILE:	TRA Ag Infill	Applicants seeking an exemption to the FMMP determination must demonstrate that the TRA site qualifies as an Infill Site (as defined in Appendix A).	Uploaded to HCD?	N/A
FAAST FILE:	TRA Local Approvals	Statement from entity indicating the TRA Capital Project is consistent with all applicable local rules, regulations, codes, policies and plans enforced or implemented by that entity.	Uploaded to HCD?	Yes
PGM				
FAAST FILE:	EFC PGM1, EFC PGM2, EFC PGM3	Supporting documentation for the 0 non-AHSC PGM funding commitments.	Uploaded to HCD?	N/A
Quantitative Policy				
FAAST FILE:	Bicycle Network Connectivity	Identify the Project component that links the AHD or Qualifying Transit Station or Stop to a bicycle network on the Transit Service Map (from Overview worksheet). Upload the official public planning document including map showing connectivity.	Uploaded to HCD?	Yes
FAAST FILE:	Safe Bicycle Routes	Provide one of the following: Traffic and safety studies that detail existing problems, existing traffic conditions and traffic projections from a Public Agency; photos of existing conditions that demonstrate existing problems with the bikeway; or a letter from a Public Agency that explains the current problems with the bikeway, and how the proposed improvement will fix it.	Uploaded to HCD?	Yes
FAAST FILE:	Pedestrian Network Connectivity	PAM - identify a pedestrian crossing point that directly links two pedestrian networks that are unlinked for one quarter mile along a walkable route.	Uploaded to HCD?	Yes
FAAST FILE:	Safe Pedestrian Routes	Provide one of the following: Traffic and safety studies that detail existing problems, existing traffic conditions and traffic projections from a Public Agency; photos of existing conditions that demonstrate existing problems with the walkway; or a letter from a Public Agency that explains the current problems with the walkway, and how the proposed improvement will fix it.	Uploaded to HCD?	Yes
FAAST FILE:	Green Building Status	Provide signed letter from a certified LEED Green rater, certified Green Point rater, or licensed engineer stating the green building status.	Uploaded to HCD?	Yes
FAAST FILE:	Electric Design	Document the AHD or Mixed Use Development will contain the level of electricity stated above.	Uploaded to HCD?	Yes
FAAST FILE:	GGRF Fund Evidence	Provide proof of funding: Notice of Final award (must include amount of program funding awarded and date of award), or documentation detailing how the funds received from said Program will contribute to the development of the AHSC Project.	Uploaded to HCD?	N/A
FAAST FILE:	High Speed Rail Area	Document Project's location within environmentally cleared High Speed Rail Station Planning Area.	Uploaded to HCD?	N/A
FAAST FILE:	Community Based Org Agrmnt	Executed agreement between the community based organization and applicant identifying the outcomes of the funded work.	Uploaded to HCD?	N/A
FAAST FILE:	Anti-Displacement Resident	Document each strategy or program and how it relates to the AHSC Project; how strategies exceed state requirements, if applicable; and who will implement any strategies under "Voluntarily Implemented by Applicants" and how they will do so.	Uploaded to HCD?	Yes
FAAST FILE:	Anti-Displacement Business	Document who is responsible for each strategy, policy, or program claimed and include either a brief explanation or a web link to the Applicant/Local Jurisdiction's implementation or requirement of the strategy, policy, or program.	Uploaded to HCD?	Yes
FAAST FILE:	Workforce Strategy A, B, C, D	Document each workforce development strategy including the name of the organization(s) they are partnering with, the demographic data on the population they serve, and a written agreement that details the partnership strategy or policy undertaken and its outcomes.	Uploaded to HCD?	Yes
FAAST FILE:	Workforce Development	Must submit program metrics detailing the demographics and numbers of individuals recruited, trained, and placed into state-certified apprenticeships or related jobs.	Uploaded to HCD?	
FAAST FILE:	Skilled Workforce	A letter of intent letter of intent between the developer and the certified apprenticeship program outlining the mechanism to deliver on the term of that commitment.	Uploaded to HCD?	
FAAST FILE:	Workforce Agreement	Provide agreements, including a plan to pull a defined set of pre-apprentices from local programs with close and demonstrable connections to state-certified apprenticeships.	Uploaded to HCD?	
FAAST FILE:	Workforce Local Hires	Documentation of those requirements and a concrete plan to comply, including a specific number of targeted workers or apprenticeships to be hired, the mechanism for doing so, and the programs from which they will be pulled.	Uploaded to HCD?	Yes
FAAST FILE:	Program Continuation	Document showing how the Program Operator will sustain the program beyond the term of the AHSC Program grant (three years).	Uploaded to HCD?	Yes
Narrative Policy				
FAAST FILE:	Narrative	Provide a response to each prompt listed below. Each prompt is designated by *Narrative. The responses must be uploaded as a PDF and must not exceed 6 pages. See Narrative Scoring Rubric document for guidance in completing Narratives.	Uploaded to HCD?	Yes
FAAST FILE:	Local Planning Efforts	Indicate the applicable section or elements of the local planning document Project will implement.	Uploaded to HCD?	Yes
FAAST FILE:	Site Plan & Project Map	Provide a site plan and Project area map (or context plan) detailing housing and transportation collaboration.	Uploaded to HCD?	Yes
FAAST FILE:	Community Tracker	Provide a completed AHSC Round 6 Community Engagement Tracker.	Uploaded to HCD?	Yes
FAAST FILE:	Community Needs	Letter of support from local community-based, grassroots organization describing the community engagement process and how feedback from local residents was incorporated into the Project.	Uploaded to HCD?	Yes
FAAST FILE:	Climate Matrix	AHSC Round 6 Climate Adaptation Assessment Matrix.	Uploaded to HCD?	Yes
GHG & Co-Benefits Quantification				

FAAST FILE:	GHG Benefits Calculator Tool	Completed AHSC Benefits Calculator Tool, with worksheets applicable to the project and all fields in the GHG Summary and Co-benefits Summary tabs populated. Click here for instructional video.	Uploaded to HCD?	Yes
FAAST FILE:	GHG Affordable Housing	Documentation of affordable housing development inputs, including the following: - Number and type of dwelling units; - Number of affordable unit (per Guidelines definition); - Number of stories; and - Net density	Uploaded to HCD?	Yes
FAAST FILE:	GHG Distance to CBD	Map documenting distance to central business district, determined using the CARB tool available at: www.arb.ca.gov/cc/capandtrade/auctionproceeds/kml/jobcentermap.htm	Uploaded to HCD?	Yes
FAAST FILE:	GHG Mixed-Used Development	Documentation of mixed-use development inputs, including proposed uses and total areas of each type of space	Uploaded to HCD?	Yes
FAAST FILE:	GHG Parking	Documentation of parking inputs, including the following: - Number of residential parking spaces; and - Calculations of unbundled monthly parking cost	Uploaded to HCD?	Yes
FAAST FILE:	GHG Transit Subsidy	Documentation of transit subsidy program, including the following: - Number of dwelling units to receive transit subsidies; - Type and annual value of transit subsidies to residents; and - Number of years for which subsidies will be funded	Uploaded to HCD?	Yes
FAAST FILE:	GHG Average Daily Traffic	Documentation of average daily traffic for the street parallel to each proposed bicycle or pedestrian facility	Uploaded to HCD?	Yes
FAAST FILE:	GHG Bike Share	Letter from bike share partner (on bike share organization letterhead and signed by bike share organization staff) documenting the following: - Calculations of number of bike share trips per year, bicycle energy use, and avg. cost per trip	Uploaded to HCD?	N/A
FAAST FILE:	GHG Transit Component (Submit documentation for each service or capital improvement and number according to order on Transit Inputs tab)	Letter from transit agency partner (on transit agency letterhead and signed by transit agency staff) documenting the following for each new or expanded service or capital improvement: - Type of service, vehicle, fuel, and engine; - Days of operation; - Adjustment factor and length of average auto trip reduced, if different from default; - Tolls avoided & parking costs at transit facility; & - Calculations of increase in ridership & vehicle miles traveled or fuel consumption of transit vehicle	Uploaded to HCD?	Yes
FAAST FILE:	GHG Transit Map	Map documenting new or expanded transit routes or capital improvements	Uploaded to HCD?	Yes
FAAST FILE:	GHG PVWatts Results	PVWatts Calculator results spreadsheet, generated via pwwatts.nrel.gov/	Uploaded to HCD?	Yes
FAAST FILE:	GHG Solar PV System	Documentation of solar PV system, including the following: - Number of solar PV panels; - Watts per panel	Uploaded to HCD?	Yes
Project Area Map Data Layers (Optional)				
FAAST FILE:	Project Area Map Data Layers	Optional: In a single file or as multiple files, provide the mapping data layers used to create the Project Area Map. Acceptable file formats include: ArcGIS--geodatabase (.gdb), layer package (.lpx), map package (.mpk), zipped shapefile (including the .shp, .dbf, .prj and .shx files) ; Google Maps or Google Earth (.kml or .kmz); and geojson and csv files for location data.	Uploaded to HCD?	N/A

Application Development Team (ADT) Support Form

4/27/21

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	AHSC							
2	AHSC							
3	AHSC							
4	AHSC							
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25	AHSC							

HCD AHSC Balboa Reservoir Building E Expenditure Schedule

Proposed expenditures for the HCD AHSC Balboa Reservoir Building E Grant.

	Agency	Project Description	HCD Funding Amount
STI #1	BRIDGE/BART	Purchase of 2 BART rail cars. BART will purchase two new BART cars. These vehicle purchases are part of BART's Transbay Corridor Core Capacity Program, which will increase the number of trains operating through the Transbay Tube during peak hours, increase train lengths, and maximize throughput capacity throughout the system, increasing BART's capacity to carry passengers.	\$5,034,634
STI #2	BRIDGE	Installation of 2,802 LF of new context sensitive Class II, III, and Class IV bikeways on Lee Ave that connect to existing bike networks. Installation of 2,802 LF of new sidewalks along Lee Ave, which results in a key pedestrian network gap closure.	\$2,954,301
TRA #1	BRIDGE/BART	BART will install 20 Next Generation Fare Gate consoles at Balboa Park BART Station as part of an effort to upgrade all fare gates throughout its system. BART's current fare gates are decades old and have proven ineffective in deterring fare evasion, which costs BART millions of dollars annually. The existing fare gates are also declining in reliability as they age. The Next Generation Fare Gate design incorporates a tall, swing-style gate with improved passenger throughput and maintainability, and a more modern appearance.	\$1,300,000
TRA #2	BRIDGE	Installation of 10 street lights on the Balboa Reservoir campus	\$432,406
PGM	BRIDGE	Transit passes, GRID alternatives	\$253,741

Total: \$9,975,082

AFFORDABLE HOUSING AND SUSTAINABLE COMMUNITIES PROGRAM

ROUND 6
FY 2019-2020 PROGRAM GUIDELINES



CALIFORNIA STRATEGIC
GROWTH COUNCIL



February 24, 2021

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Note: Defined terms are bolded throughout the document. Refer to Appendix A for complete definitions.

Article I. AHSC General Overview

Section 100. Purpose and Scope

- (a) The purpose of these Program Guidelines is to implement Division 44, Part 1 of the Public Resources Code (PRC) (commencing with Section 75200), which establishes the Affordable Housing and Sustainable Communities (AHSC) Program, hereinafter referred to as the **AHSC Program**.
- (b) The purpose of the **AHSC Program** is to reduce greenhouse gas (GHG) emissions through projects that implement land-use, housing, transportation, and agricultural land preservation practices to support infill and compact development, and that support related and coordinated public policy objectives, including the following:
 - (1) reducing air pollution;
 - (2) improving conditions in disadvantaged communities;
 - (3) supporting or improving public health and other co-benefits as defined in Section 39712 of the Health and Safety Code;
 - (4) improving connectivity and accessibility to jobs, housing, and services;
 - (5) increasing options for mobility, including the implementation of the Active Transportation Program established pursuant to Section 2380 of the Streets and Highway Code;
 - (6) increasing transit ridership;
 - (7) preserving and developing affordable housing for lower income households, as defined in Section 50079.5 of the Health and Safety Code; and
 - (8) protecting agricultural lands to support infill development.

Section 101. AHSC Program Overview

The **AHSC Program** furthers the purposes of **AB 32** (Chapter 488, Statutes of 2006), **SB 375** (Chapter 728, Statutes of 2008), and **SB 32** (Chapter 249, Statutes of 2016) by investing in projects that reduce GHG emissions by supporting more compact, infill development patterns, encouraging active transportation and transit usage, and protecting agricultural land from sprawl development. The Greenhouse Gas Reduction Fund (GGRF), an account established to receive proceeds from Cap-and-Trade auctions, provides funding for the **AHSC Program**. The Cap-and-Trade Program, a key strategy for achieving the GHG emission reduction goals of AB 32, issues a limited number of GHG emissions permits (called allowances) each year. A portion of these allowances can be purchased from the State at quarterly auctions, thereby generating auction proceeds. These State auction proceeds are then deposited in the GGRF, where they become available for appropriation by the Legislature to further the purposes of AB 32.

The **AHSC Program** is administered by the **California Strategic Growth Council (Council or SGC)**. The **Department of Housing and Community Development (Department)** will implement the transportation, housing and infrastructure components of the **AHSC Program**. The **Council** staff will coordinate efforts with **Department** staff, working with the **California Air Resources Board (CARB)** and the **Council** to administer the broader **AHSC Program**, including developing program guidelines, evaluating applications, preparing agreements, monitoring agreement implementation, and program reporting.

- The **Council** will coordinate with **CARB** to develop and incorporate consistent guidance in the following areas, which will apply to all GGRF programs, including the **AHSC Program**:
 - Expenditure records to ensure investments further the goals of AB 32.
 - SB 535 (Chapter 830, Statutes 2012) and AB 1550 requirements to maximize benefits to **Disadvantaged Communities, Low-Income Communities, and Low-Income Households**.
 - Consistent methodologies for quantifying GHG reductions and other economic, environmental and public health co-benefits.
 - Project tracking and reporting.

The **AHSC Program** provides grants and/or loans to projects that achieve GHG emission reductions and benefit **Disadvantaged Communities, Low-Income Communities, and Low-Income Households** through increasing accessibility of affordable housing, employment centers and **Key Destinations** via low-carbon transportation resulting in fewer vehicle miles traveled (VMT) through shortened or reduced vehicle trip length or mode shift to transit, bicycling or walking. Three **Project Area** types have been identified to implement this strategy: 1) Transit-Oriented Development (TOD) Project Areas, 2) Integrated Connectivity Project (ICP) Project Areas, or 3) Rural Innovation Project Areas (RIPA).

AHSC award funds will be allocated through a competitive process, based on the merits of applications submitted and the proposed use of funds within the identified **Project Area**. The threshold requirements and application selection criteria focus on the extent to which

developments realize the **AHSC Program's** objectives of reducing GHG emissions, benefiting **Disadvantaged Communities, Low-Income Communities, and Low-Income Households**, providing affordable housing, demonstrating project readiness, and meeting other policy considerations.

Disadvantaged Community Benefits

In June 2018, using the updated results from CalEnviroScreen 3.0, the California Environmental Protection Agency (CalEPA) identified **Disadvantaged Communities** to include census tracts that fall within the top 25 percent of CalEnviroScreen 3.0, plus an additional 22 census tracts that score in the highest 5 percent of CalEnviroScreen's Pollution Burden but do not have an overall CalEnviroScreen score because of unreliable socioeconomic or health data. AB 1550 has also created investment requirements for **Low-Income Communities** and **Low-Income Households**. In July 2018, CARB approved the *Funding Guidelines for Agencies Administering California Climate Investments* that will provide criteria to evaluate whether a project provides a benefit to a **Disadvantaged Community, Low-Income Community, or Low-Income Household**. These guidelines can be found [here](#)..

A **Project** that is located in and provides benefits to a **Disadvantaged Community, Low-Income Community, or Low-Income Households** may receive priority for funding in order to meet the AHSC Program **Disadvantaged Community and Low-Income Community** funding requirements. **Projects' Disadvantaged Community and Low-Income Community** status are based upon the location of their AHSC funded **Affordable Housing Development**.

Article II. Program Requirements and Procedures

Figure 1: AHSC Program Summary

Project Area Types	Transit-Oriented Development (TOD) Project Area	Integrated Connectivity Project (ICP) Project Area	Rural Innovation Project Area (RIPA)
Transit Requirements (All Project Areas) §102	<ul style="list-style-type: none"> ▪ MUST include Qualifying Transit ▪ Qualifying Transit includes various forms of Rail Service, Bus Service and Flexible Transit Service. ▪ All Project Areas MUST also include a Transit Station/Stop, served by at least one Qualifying Transit line departing two or more times during Peak Hours (unless it is Flexible Transit Service). This level of service must have been publicly posted by the provider at some point between January 2020 and the time of application. <p><i>Note: ICP/RIPA projects that propose addition of High Quality Transit will remain eligible as an ICP/RIPA.</i></p>		
Project Area Specific Transit Requirements §102	<ul style="list-style-type: none"> ▪ MUST be served by High Quality Transit ▪ Headway frequency of 15 minutes or less during Peak Hours ▪ Must operate on a railway or be a Bus Rapid Transit (BRT) service that either fully or partially operates on a dedicated bus-only lane 	<ul style="list-style-type: none"> ▪ CANNOT be served by High Quality Transit 	<ul style="list-style-type: none"> ▪ CANNOT be served by High Quality Transit ▪ MUST be located within a Rural Area
Required AHSC Funded Components §102 & §103	<ul style="list-style-type: none"> ▪ At least fifty (50) percent of AHSC Program funds MUST be used for Affordable Housing (which <u>includes</u> Affordable Housing Developments or Housing Related Infrastructure) AND ▪ At least one other type of Eligible Capital Project or Program Cost 	<ul style="list-style-type: none"> ▪ At least fifty (50) percent of AHSC Program funds MUST be used for Affordable Housing (which includes Affordable Housing Developments or Housing Related Infrastructure) ▪ AHSC Program funds MUST be used for Sustainable Transportation Infrastructure AND Affordable Housing (which includes Affordable Housing Developments or Housing Related Infrastructure) 	
Eligible Capital Projects or Program Costs §103	<ul style="list-style-type: none"> ▪ Affordable Housing Developments (AHD) ▪ Housing Related Infrastructure (HRI) ▪ Sustainable Transportation Infrastructure (STI) ▪ Transportation-Related Amenities (TRA) ▪ Programs (PGM) 		
Affordable Housing Development Requirements §103	<p>Affordable Housing Developments may be:</p> <ul style="list-style-type: none"> ▪ New construction ▪ Acquisition and Substantial Rehabilitation including preservation of affordable housing at-risk ▪ Conversion of one or more nonresidential structures to residential dwelling units 		
Funds Available §108	Target 35 percent of available funds to TOD Project Areas	Target 35 percent of available funds to ICP Project Areas	Target 10 percent of available funds to RIPAs
	Target a project from a Federally Recognized Native American Tribe, an eligible entity having co-ownership with a Federally Recognized Native American Tribe, or an eligible entity established by a Federally Recognized Native American Tribe to undertake Tribal housing projects		
Project Awards §104	All Project Area Types are subject to the following minimum and maximum award amounts: Maximum: \$30 Million Minimum: \$1 Million		
Statutory Funding Set-asides §108	<ul style="list-style-type: none"> ▪ 50 percent of the AHSC Program expenditures shall be for Affordable Housing (Health & Safety Code § 39719(a)(1)(C)) ▪ 50 percent of AHSC Program expenditures shall be for projects located within and providing benefits to Disadvantaged Communities (Public Resources Code § 75214) <p><i>Note: A single project can address both set-asides above and set-asides are not mutually exclusive.</i></p>		

Section 102. Eligible Projects

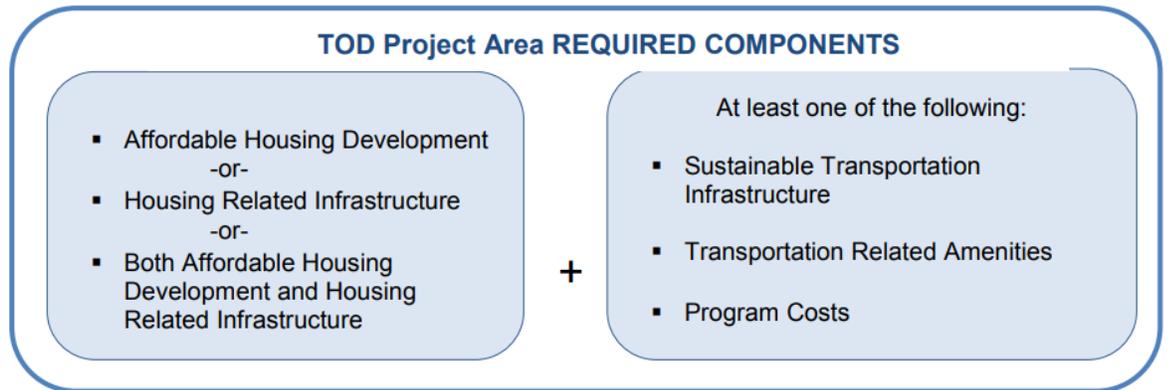
The **AHSC Program** is designed to implement GHG emissions reductions through a reduction of vehicle miles travelled (VMT), or fewer and shorter auto-trips. The **AHSC Program** will fund integrated land use and transportation projects supporting low-carbon transportation options. Promoting mode shift to low-carbon transportation will require strategies that link residential areas, major employment centers and other **Key Destinations** to accessible, reliable, affordable, safe and comfortable transit and active transportation options.

- (a) All applicants are required to define a **Project Area**. The **Project Area** is the area which encompasses transit, housing and destinations and is the area in which **AHSC Program** funds will be invested. Each **Project Area** must:
 - (1) Be a contiguous area included within a distinct planning area in a local or regional planning document(s) or transit service area
 - (2) Include at least one **Transit Station/Stop** consistent with the requirements set forth in (c) or (d) below; and
 - (3) Be of a defined size consistent with one of the following:
 - (A) For **Project Areas** with fixed transit routes, the defined **Project Area** begins with a one (1) mile radius from the identified **Transit Station/Stop**. The **Project Area** will extend by a 1/2 mile buffer around all **Sustainable Transportation Infrastructure** so long as the **Project Area** remains contiguous.
 - (B) For Project Areas with **Flexible Transit Service** routes, the defined **Project Area** must be defined based on the identified service area of the transit line.
 - (C) For Project Areas which include a **Transit Corridor** or bicycle network or both, the defined **Project Area** must be identified in a plan, i.e. general plan, bicycle master plan or transit corridor implementation plan.
- (b) The **AHSC Program** includes three eligible **Project Area** types as defined below:
 - (1) Transit-Oriented Development (TOD) **Project Areas**,
 - (2) Integrated Connectivity Project (ICP) **Project Areas**, and
 - (3) Rural Innovation **Project Areas** (RIPA).

All projects regardless of **Project Area** type must demonstrate VMT reduction through fewer or shorter vehicle trips or incentivize mode shift to transit use, bicycling or walking within transit areas, with an emphasis on integration of or development of affordable housing, and with an emphasis on providing **Disadvantaged Community** or **Low-Income Community** benefits. There are several differentiating requirements between each **Project Area** type, as described below.

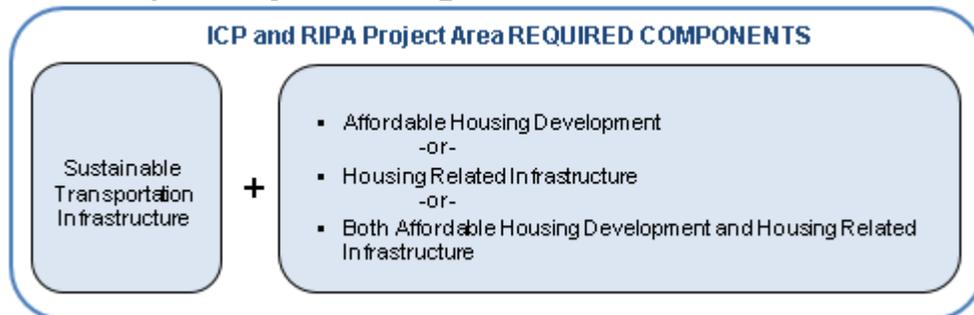
(c) **TOD Project Areas** must demonstrate all of the following:

- (1) Include at least one (1) **Transit Station/Stop** served by **High Quality Transit** at the time of application submittal;
- (2) Include an **Affordable Housing Development** located no farther than one-half mile from a **Transit Station/Stop** served by **High Quality Transit**. While the TOD Project Area must include an **Affordable Housing Development**, it may be funded from sources other than the AHSC Program but must meet the requirements of Section 103 (a)(1)(A) through (C); and
- (3) Include **Capital Projects** or **Program Costs** as follows:



(d) **ICP Project Areas** must meet all of the following:

- (1) Include at least one (1) **Transit Station/Stop**
- (2) Include an **Affordable Housing Development** served by at least one (1) mode of **Qualifying Transit** that does not meet the requirements of **High Quality Transit** at the time of application submittal; and
- (3) Include **Capital Projects** or **Program Costs** as follows:



Affordable Housing Developments must be located within one-half mile of a **Transit Station/Stop** by the time a certificate of occupancy is provided.

(e) **RIPAs** must meet all the requirements detailed in Section 102(d) above for an **ICP Project Area** and must be located within a **Rural Area**.

Section 103. Eligible Costs

The **AHSC Program** funds **Capital Projects** and eligible **Program Costs** within TOD, ICP and RIPA **Project Areas** consistent with requirements of Section 102(c), (d) and (e) as follows:

Figure 2 Eligible Capital Projects and Program Costs
Eligible Capital Projects
<ul style="list-style-type: none"> ▪ Affordable Housing Development (AHD) ▪ Housing-Related Infrastructure (HRI) ▪ Sustainable Transportation Infrastructure (STI) ▪ Transportation-Related Amenities (TRA)
Eligible Program Costs (PGM)
<ul style="list-style-type: none"> ▪ Active Transportation Programs ▪ Transit Ridership Programs ▪ Criteria Air Pollutant Programs ▪ Workforce Development Programs ▪ Car Share Programs

Note: Each Capital Project or Program Cost must be unique to a single application and cannot be split over multiple applications.

Examples of **Eligible Costs** within each category of eligible **Capital Projects** and **Program Costs** are identified in Figure 3 below:

Figure 3: Eligible Cost Examples	AHD/ HRI	STI	TRA	PGM
Construction or Substantial Rehabilitation of affordable housing	X			
Installation of internet broadband trunk line or fixed wireless infrastructure	X			
Installation of new or improved walkways that improve mobility and access of pedestrians		X		
Installation of new or improved bikeways that improve mobility and access of cyclists		X		
Installation of new or improved pedestrian crossings or over-crossings		X		
Non-capacity increasing streetscape improvements, including, but not limited to the installation of lighting, signage, or other related amenities for pedestrians, cyclists and transit riders			X	
Street crossing enhancements including installation of accessible pedestrian signals		X		
Traffic calming projects including development of curb extensions, roundabouts, median islands, "road diets," lane narrowing projects		X		
Signage and way-finding markers			X	

Figure 3 (continued): Eligible Cost Examples	AHD/HRI	STI	TRA	PGM
Installation of traffic control devices to improve safety of pedestrians and bicyclists		X		
Street furniture (e.g. benches, shade structures, etc.)			X	
Bicycle repair kiosks			X	
Publicly accessible bicycle parking			X	
Bike sharing infrastructure and fleet		X		
Bicycle carrying structures on public transit			X	
Development of a dedicated bus lanes as part of a BRT project		X		
Development and/or improvement of transit facilities or stations		X	X	
Transit related equipment to increase service or reliability		X		
Transit Signal Priority technology systems		X		
Real-time arrival/departure information systems			X	
Installation of at-grade boarding infrastructure		X		
Development or improvement of shelters or waiting areas at transit station/stops			X	
Transit ticket machine purchase or improvements			X	
Transit passenger amenities - e.g. Wi-Fi access			X	
Transit Vehicle Procurement for service expansion, including expansion beyond service levels offered during the COVID-19 pandemic		X		
Transit Operations for service expansion, including expansion beyond service levels offered during the COVID-19 pandemic		X		
Station area signage			X	
Energy Efficiency and Renewable Energy	X	X	X	
Open Network or transit vehicle only ZEV Charging Infrastructure	X	X	X	
Water Efficiency	X	X	X	
Urban Greening	X	X	X	
Pedestrian and bicycle safety education programs				X
Development and publishing of community walking and biking maps, including school route/travel plans				X
Development and implementation of "walking school bus" or "bike train" programs				X
School crossing guard training programs				X
Bicycle clinics				X
Public outreach efforts to increase awareness and understand the needs of active transportation users				X
Bike sharing program operations				X
Ride and/or car share programs				X
Transit subsidy programs				X
Education and marketing of transit subsidy programs				X

Transportation Demand Management (TDM) programs				X
Air pollution exposure reduction program				X
Workforce development partnerships				X
Tenant legal counseling services				X

(a) **Capital Projects**

(1) **Affordable Housing Development Capital Projects**

(A) **Affordable Housing Development Capital Projects** must:

(i) Consist of one or more of the following:

- a. New Construction
- b. Acquisition and **Substantial Rehabilitation** (including preservation of affordable housing at-risk of conversion to market rate). The acquisition must be made through a bona fide sale or transfer from the existing ownership entity to the new ownership entity comprised of a completely disparate ownership structure, which contains no common entity interest at any level of the organizational structure.
- c. Conversion of one or more nonresidential structures to residential dwelling units;

*Note: Re-syndication of an **Affordable Housing Development** is not an eligible **Capital Project**.*

- (ii) Be located within one-half (½) mile from a **Transit Station/Stop** that meets the **Project Area** transit requirements as defined in Section 102(c) or (d). The one-half (½) mile is to be measured from the nearest boarding point of the **Transit Station/Stop** to the entrance of the residential structure in the **Affordable Housing Development** furthest from the **Transit Station/Stop** along a walkable route. The walkable route, 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, minimize stretches without shade or cover, or stretches without lighted streets;
- (iii) Rental **Affordable Housing Developments** must include at least 20 percent of the total residential units as **Affordable Units** with an overall **Project** average affordability of all **Restricted Units** within the **Project** no greater than 50 percent represented by **Area Median Income (AMI)**. Average affordability means the total number of **Restricted Units** multiplied by each restricted affordability level divided by the total **Restricted Units**. For example, for a 30-unit

Project with 10 units restricted to 40 percent and 10 units restricted to 60 percent AMI the calculation of the average affordability would be as follows:

10 units @ 40% AMI → 10 x 40 = 400
 10 units @ 60% AMI → 10 x 60 = 600
 400 + 600 = 1000
 1000/ 20 total **Restricted Units** = average affordability of 50%

Homeownership **Affordable Housing Developments** must include at least 20 percent of the total residential units as Affordable Units with an overall **Project** average affordability of all **Restricted Units** within the **Project** no greater than 80 percent represented by **Area Median Income (AMI)**.

and;

- (iv) Have a minimum **Net Density**, upon completion of the **Affordable Housing Development**, not less than that shown on the following table:

Figure 4: Minimum Net Density Requirements		
Project Area Type	Residential only Projects	Mixed-Use Projects (Floor Area Ratio)
TOD	30 units per acre	>2.0
ICP	20 units per acre	>1.5
RIPA	15 units per acre	>0.75

- a. Mixed-use **Affordable Housing Developments** may demonstrate consistency with the **Net Density** requirements through either the unit per acre or **Floor Area Ratio** requirements detailed in Figure 4.
- b. Acquisition and **Substantial Rehabilitation** (including preservation of affordable housing at-risk of conversion to market rate housing) are exempt from the above minimum density requirements but shall not result in fewer units or lower percentage of total affordability than currently exists except where reductions in unit count are required to meet building code requirements.
- (v) Must supply at least one (1) **Secure Overnight Bicycle Parking** spot for every two residential units that is not publicly accessible and is completely enclosed. Bicycle parking at the **Affordable Housing Development** will be considered an eligible cost but may not be used to meet required **Project Area** components as outlined in Section 102.

- (B) **Affordable Housing Development Capital Projects** may:
- (i) Include residential units that are rental or owner-occupied, or a combination of both;
 - (ii) Consist of scattered sites constituting a single, integrated **Affordable Housing Development** that meets the requirements set forth by Section 8303(b) of the Uniform Multifamily Regulations (UMRs); or
 - (iii) Include nonresidential uses that are compatible under local zoning.
- (C) Eligible costs for **Affordable Housing Development Capital Projects** are limited to:
- (i) Costs for a **Housing Development**, as specified in Section 7304 (a) and (b) of the MHP Guidelines dated June 19, 2019 (“MHP Guidelines”). Section 7304 (b) (10) the reasonable developer fee subject to the applicable TCAC Regulations dated December 21, 2020 and the provisions of Section 7305 except that 7305(b)(2) is replaced with the following: For Projects utilizing 4 percent tax credits, the developer fee paid from development funding sources shall not exceed the amount in Title 4 CCR, Section 10327 (c)(2)(A).
 - (ii) 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, appraisals, legal expenses, and necessary easements. Soft costs shall not exceed 10 percent of costs associated with the funding request for the **AHD Capital Project**.
 - (iii) Each AHSC application may budget up to 2 percent of their total funding request for **Employment Benefits and Outcomes Reporting**. This amount will scale with the size of the Applicant’s funding request. Applicants should consider the size of their loan and grant funded project components when allocating this item into capital cost budgets. **Employment Benefits and Outcomes Reporting** costs are not included within the soft costs cap.
- (D) **Affordable Housing Development** and **Housing Related Infrastructure Capital Projects** must comprise *at least* fifty (50) percent of total AHSC funds requested.
- (E) For AHSC application purposes, a **Project** may not contain more than one **Affordable Housing Development Capital Project**. A single **Affordable Housing Development Capital Project** may not include more than one **Affordable Housing Development**, nor may it include an **Affordable Housing Development** that contains multiple development sites when one development site is receiving 4 percent low-income

housing tax credits, and another is receiving 9 percent low-income housing tax credits, or when the multiple development sites are each receiving separate 4 percent low-income housing tax credits. An application proposing an **Affordable Housing Development** with both 4 percent low-income housing tax credits and 9 percent low-income housing tax credits, or with multiple 4 percent low-income housing tax credits, will be disqualified on the grounds that it is not proposing a **Project** within the meaning and design of the **AHSC Program**. To the extent such tax credit scenarios are contemplated, they shall constitute two separate and independent **Projects**, each of which must submit an entirely separate application and qualify independently of the other.

- (i) The purpose of this language is to clarify which types of Project structures are eligible within a single AHSC application and award. This reinforces AHSC's directive to SGC, HCD, and CARB to identify and fund unified, cohesive Projects which interdependent components truly work together to create reductions in VMTs and ultimately GHG emissions. Adjustments that may occur to an application's scope resulting from seeking multiple low-income housing tax credits would likely impact said **Project's** score, impacting the competitive process. As such, **Projects** contemplating multiple low-income housing tax credits should apply as two individual applications or apply as an application which contains one **Affordable Housing Development** that intends to seek a single low-income housing tax credit.

(2) **Housing-Related Infrastructure Capital Projects**

- (A) Eligible costs for **Housing-Related Infrastructure Capital Projects** are limited to:
 - (ii) Capital improvements required by a **Locality**, transit agency, or special district as a condition to the approval of the **Affordable Housing Development**.
 - (iii) 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, appraisals, legal expenses, and necessary easements. Soft costs shall not exceed 10 percent of costs associated with the **HRI Capital Project**.
 - (iv) Each AHSC application may budget up to 2 percent of their total funding request for **Employment Benefits and Outcomes Reporting**. This amount will scale with the size of the Applicant's funding request. Applicants should consider the size of their loan and grant funded project components when allocating this item into

capital cost budgets. **Employment Benefits and Outcomes Reporting** costs are not included within the soft costs cap.

- (v) Required environmental remediation necessary for the **Capital Project** where the cost of the remediation does not exceed 50 percent of **AHSC Program** grant funds.
 - (vi) Real property acquisition of the **Housing-Related Infrastructure** project site and associated fees and costs (not to exceed 10 percent of the total **AHSC Program** award). Real estate commissions for purchase or acquisition are not an eligible expenditure.
 - (vii) Impact fees required by local ordinance are eligible for funding only if used for the identified eligible **Capital Project** not to exceed 15 percent of the **AHSC Program** award up to \$300,000.
- (B) **Affordable Housing Development and Housing Related Infrastructure Capital Projects** must comprise *at least* fifty (50) percent of total AHSC funds requested.
- (3) **Sustainable Transportation Infrastructure Capital Projects** (including **Active Transportation** and transit infrastructure)
- (A) Eligible costs for **Sustainable Transportation Infrastructure Capital Projects** are limited to:
 - (i) Capital improvements that result in the improvement or addition of infrastructure that encourages mode-shift by enhancing: 1) public transit access; 2) pedestrian network; or 3) bicycle network (includes public bike-share infrastructure and fleet) within the defined **Project Area** meeting the transit requirements detailed in Section 102 (c) or (d).
 - (ii) Soft costs such as those incidentally but directly related to construction or project plans, specifications and estimates including, but not limited to, planning, engineering, construction management, architectural, and other design work, environmental impact reports and assessments, appraisals, legal expenses, and necessary easements. Soft costs shall not exceed 30 percent of costs associated with the **STI Capital Project**.
 - (iii) Each AHSC application may budget up to 2 percent of their total funding request for **Employment Benefits and Outcomes Reporting**. This amount will scale with the size of the Applicant's funding request. Applicants should consider the size of their loan and grant funded project components when allocating this item into capital cost budgets. **Employment Benefits and Outcomes Reporting** are not included within the soft costs cap.

- (iv) **Activity Delivery Costs** that are associated with the implementation of the **Capital Project** not to exceed 10 percent of the costs associated with the **Capital Project**.
 - (v) Operations expenditures for up to 5 years that directly expand transit service, including expansion beyond service levels offered during the COVID-19 pandemic, by supporting new, restored, or expanded routes and may include wages, fueling, maintenance, and other costs to operate those services.
 - (vi) Other **Capital Project** costs required as a condition of local approval for the **Capital Project**, as approved by the **Department**.
- (B) The total combined grant amount for **Sustainable Transportation Infrastructure Capital Projects** and **Transportation-Related Amenities Capital Projects** within a **Project Area** shall not exceed \$10,000,000.
- (4) **Transportation-Related Amenities Capital Projects**
- (A) **Transportation-Related Amenities** must be publicly accessible.
 - (B) Eligible costs for **Transportation-Related Amenities Capital Projects** are limited to:
 - (i) Capital improvements that are publicly accessible and provide supportive amenities to cyclists, pedestrians, and transit riders (i.e. bike parking, bus shelter, benches, street trees, etc.) within the defined **Project Area** meeting the transit requirements detailed in Section 102 (c) or (d).
 - (ii) Soft costs such as those incidentally but directly related to construction project plans, specifications and estimates including, but not limited to, planning, engineering, construction management, architectural, and other design work, environmental impact reports and assessments, appraisals, legal expenses, and necessary easements. Soft costs shall not exceed 10 percent of costs associated with the **TRA Capital Project**.
 - (iii) Each AHSC application may budget up to 2 percent of their total funding request for **Employment Benefits and Outcomes Reporting**. This amount will scale with the size of the Applicant's funding request. Applicants should consider the size of their loan and grant funded project components when allocating this item into capital cost budgets. **Employment Benefits and Outcomes Reporting** costs are not included within the soft costs cap.
 - (iv) **Activity Delivery Costs** that are associated with the implementation of the **Capital Project** not to exceed 10 percent of the costs associated with the **Capital Project**.

(v) Other **Capital Project** costs required as a condition of local approval for the **Capital Project**, as approved by the **Department**.

(C) The total combined grant amount for **Sustainable Transportation Infrastructure Capital Projects** and **Transportation-Related Amenities Capital Projects** within a **Project Area** shall not exceed \$10,000,000.

(b) **Program Costs**

(1) **Program Costs** include those costs typically associated with 1) program creation or 2) expansion of existing programs to serve new populations or offer new program service and implementation. Eligible costs may include operational costs for programs for the term of the grant (3 years). Programs include education, outreach and training programs for **Active Transportation** or transit ridership; air pollution exposure reduction; workforce development partnerships; tenant legal counseling services; and outreach, education, and subsidy to low-income residents for **ZEV** car sharing.

(A) Tenant legal counseling services cannot be provided by the **Developer**, building manager, or related entity and must be offered through a third party.

(2) The total grant amount for **Program Costs** within a **Project Area** shall not exceed 30 percent of the funding request for the overall **Project** up to \$500,000. Costs incurred for required transit passes or cards described in Section 106 (4) will not contribute to this cap.

(c) Ineligible costs include all of the following:

- (1) Costs are not eligible for funding if there is another feasible, available source of committed funding for the **Project** portion thereof to be funded by the **AHSC Program** or if the cost is incurred prior to **AHSC Program** award;
- (2) Routine maintenance or operations of transportation infrastructure including the general transit fleet, not including maintenance or operations associated with AHSC funded transit service expansion, including expansion beyond service levels offered during the COVID-19 pandemic;
- (3) In lieu fees for local inclusionary housing programs;
- (4) Ongoing operational costs beyond the term of the grant (three years) for **Program Costs**; and
- (5) Costs associated with automobile or motorcycle parking (excluding electric vehicle charging infrastructure).
- (6) Costs and fees associated with the ongoing provision of internet service.

Section 104. Assistance Terms and Limits

- (a) The maximum **AHSC Program** loan or grant award, or combination thereof, for a TOD, ICP and RIPA **Project Area** is \$30 million with a minimum award of \$1 million.
- (b) Loans for rental **Affordable Housing Developments**, or the rental portions of an **Affordable Housing Development**, are subject to the following terms:
 - (1) **AHSC Program** funds will be provided as a loan for permanent financing by the **Department** to the owner of the **Affordable Housing Development**, with the same terms as the **Department's MHP** Program financing as set forth in Section 7308 of the MHP Guidelines.
 - (2) The maximum loan amount shall be calculated pursuant to Section 7307 of the **MHP Guidelines** based on the number of **Restricted Units** in the **Affordable Housing Development**, affordability, unit sizes, and location in addition to the base amount for loan calculation as follows: \$95,000 for projects receiving 9 percent tax credits and \$175,000 for projects not receiving 9 percent tax credits. A manager's unit will be considered to be a Restricted Unit for the purpose of allocating **Affordable Housing Development** costs and may qualify for a loan amount up to the amount applicable to the 60 percent AMI level.
 - (3) Unless contradictory to any other provision expressly set forth herein, the currently adopted and applicable UMRs as may be amended from time to time, all as set forth in the **CCR**, Title 25, commencing with Section 8300 ("UMRs") are hereby incorporated by reference in their totality into these Guidelines.
 - (4) Use of multiple **Department** funding sources on the same **Assisted Units** (subsidy stacking) is prohibited. "**Department** funding sources" shall mean loan or grant funds awarded for permanent funding of development costs (which shall not include funds specifically designated for capitalized operating or operating subsidy reserves) under the following programs:
 - (A) Supportive Housing Multifamily Housing program;
 - (B) **MHP**;
 - (C) Veterans Housing and Homelessness Prevention program;
 - (D) No Place Like Home Program, including funds awarded either by the Department or an Alternative Process County;
 - (E) Affordable Housing and Sustainable Communities program - Affordable Housing Development loans, but not grants for Housing Related Infrastructure, Sustainable Transportation Infrastructure, Transportation Related amenities or Program Costs, all as defined in the program guidelines;

- (F) Transit Oriented Development program – rental housing development loans, but not grants for infrastructure;
 - (G) Joe Serna, Junior Farmworker Housing Grant program;
 - (H) SB 2 Farmworker Housing Program;
 - (I) Housing for a Healthy California program, including funds awarded either by the Department of Housing and Community Development or a county.
- (c) Grants shall be subject to the following terms:
- (1) The applicant must demonstrate that the grant will not result in a profit that exceeds the commercially reasonable range for other developments of similar size and level of risk.
 - (2) **AHSC Program** grant funds will be disbursed as reimbursed progress payments only after the execution of the Standard Agreement in the amount not to exceed the **AHSC Program** award of funds.
 - (3) Costs incurred prior to award are not eligible for reimbursement.
 - (4) If the **Capital Project** grant includes multiple phases or developments, all entitlements and construction funding commitments for the first phase must be received prior to the initial disbursement of AHSC funds.
 - (5) For **Housing-Related Infrastructure Capital Project** grants:
 - (A) The total **Housing-Related Infrastructure Capital Project** grant amount is \$35,000 per residential rental unit in the proposed **Affordable Housing Development**, or \$50,000 per rental **Restricted Unit**.
 - (B) Conditions precedent to the first disbursement of **AHSC Program** funds shall include receipt of all required public agency entitlements and all construction funding commitments for the **Affordable Housing Development** supported by the **Housing-Related Infrastructure Capital Project**.
 - (C) Rental **Affordable Housing Developments** supported by the **Housing-Related Infrastructure Capital Project** shall be subject to a recorded covenant ensuring affordability for duration of at least 55 years, recorded on the fee interest of the real property on which the rental **Affordable Housing Development** is to be located.
 - (D) Homeownership **Affordable Housing Developments** supported by the **Housing-Related Infrastructure Capital Project** shall be subject to a recorded covenant with a duration of at least 30 years that includes either a resale restriction or equity sharing upon resale, recorded on the fee interest of the real property on which the homeownership **Affordable Housing Development** is to be located.

- (E) For homeownership **Affordable Housing Developments, AHSC Program** assistance will be provided in the form of a grant from the **Department** to a **Locality** or **Developer**. It will be disbursed as reimbursed progress payments for **Eligible Costs** incurred for the construction of **Housing Related Infrastructure** required as a condition of approval of the homeownership **Affordable Housing Development**, made available for sale to qualified first-time homebuyers. The maximum first-time homebuyer grant amount is calculated to match the maximum loan amount pursuant to Section 7307 of the **MHP Guidelines** based on the number of **Restricted Units** in the **Affordable Housing Development**, affordability, unit sizes, and location in addition to the base amount of \$175,000. **Restricted Units** with affordability greater than 60 percent but no greater than 80 percent will have maximum first-time homebuyer grant amounts calculated according to matching unit sizes and location with affordability of 60 percent represented by **AMI**. Prior to any disbursement, an affordability covenant will be recorded against the fee interest in the property of the **Affordable Housing Development**. At the time of sale of the **Restricted Unit** to a qualified first-time homebuyer, either the affordability covenant or a resale restriction will be recorded against the **Restricted Unit** for a period of not less than 30 years from the date of recordation.

Section 105. Eligible Applicants

(a) Eligible Applicants

- (1) Eligible applicant entities shall include any of the following:
 - (A) A **Locality**, public housing authority, redevelopment successor agency, transit agency or transit operator, Regional Transportation Planning Agency (RTPA), local Transportation Commission, Congestion Management Agency, Joint Powers Authority (JPA), school district, facilities district, University or Community College District.
 - (i) For **STI** or **TRA** components only, an applicant may provide an executed agreement with a specific **Locality** or transportation agency non-applicant for the completion of the **STI** or **TRA** components of the AHSC Project for which funding is sought.
 - (B) A **Developer** or **Program Operator**.
 - (C) A **Federally Recognized Native American Tribe** whose **Project** meets requirements listed in detail in Appendix B.
- (2) A special purpose entity formed and controlled by the **Developer**, and which will serve as the ultimate borrower of AHSC loan funds, is not an eligible **Applicant**. A special purpose entity ultimate borrower may be listed on the AHSC Program application in the appropriate, designated fields for listing such a borrower entity.
- (3) Where a **Public Agency** has a real property interest in the proposed **Project**, the application must include the **Public Agency** as a joint applicant or otherwise include a commitment to enter into a contractual agreement to develop the **Project**, if it is awarded.
- (4) Joint applicants for the **Project** will be held jointly and severally liable for the completion of the **Project**.
 - (A) A **Recipient** of **Department** funds must remain liable for performing all requirements of the award of funds as set forth in the Standard Agreement. Where there are multiple **Recipients**, all such **Recipients** must remain jointly and severally liable to the **Department** for that performance. Notwithstanding the foregoing, **Recipients** may indemnify each other by entering into agreements with one another as to particular portions of the award. In no event will any such agreement alter, amend, or revoke each individual **Recipient's** obligations to the Department, including the joint and several liability.

Section 106. Program Threshold Requirements

(a) Application Threshold Requirements

In addition to requirements detailed in Sections 102 through 105, to be eligible for **AHSC Program** funding, an application shall demonstrate to the **Department** all of the following:

- (1) The proposed **Project** will achieve a reduction in GHG emissions through fewer vehicle miles travelled (VMT), pursuant to the most recent **AHSC Program** Quantification Methodology, available on the California Air Resources Board's [Climate Change Investments \(CCI\) Quantification, Benefits and Reporting Materials webpage](#) . This must be evidenced by completed GHG Benefits Calculator tool, described in the AHSC Application, displaying VMT and GHG reductions for each **Project** component.
- (2) The proposed **Project** supports the implementation of the applicable Sustainable Community Strategy (SCS), as confirmed by the Metropolitan Planning Organization (MPO), or similar sustainable planning document in non-MPO regions, as required by Public Resources code section 75210 *et seq.* The application must be consistent with activities or strategies identified in the regional SCS, or similar planning document that demonstrate a per capita reduction in VMT and GHG.
- (3) The proposed **Project** must be consistent with the State Planning Priorities established pursuant to Section 65041.1 of the Government Code.
- (4) All proposed **Affordable Housing Developments** must provide free transit passes, reloadable transit cards, or discounted passes priced at no more than half of retail cost. At least one (1) pass or card shall be made available for each Restricted Unit for at least 3 years. The card or pass should have a minimum value of 40 average commute length rides a month as determined by the transit agency. These passes or cards may be paid for with AHSC funding.
- (5) Applicants of all proposed **Affordable Housing Developments** must certify that the development will be smoke free and demonstrate compliance by submitting a **Smoke Free Housing** lease addendum prior to construction loan closing.
- (6) The AHSC funded components of the **Project** must:
 - (A) Incorporate more than one **Urban Greening** feature with dedicated maintenance for at least two years. Applicants must propose at least \$200,000 in reasonable direct **Urban Greening** costs.
 - (B) Include adequate lighting in accordance with local, state, and federal design standards and requirements for all publicly accessible components of the **Project** including active transportation routes and transit stations or stops.

- (7) The **Project** must demonstrate a level of committed funding at time of application that is 90 percent or greater calculated by the following equation:

$$\frac{\text{AHSC funds requested} + \text{Enforceable Funding Commitments (EFCs)} - \text{Deferred Costs}}{\text{Total Development Cost} - \text{Deferred Costs}}$$

*Note: HRI grant requests for Homeownership **Affordable Housing Developments** will not be counted as part of this equation, and therefore are exempt from this EFC threshold.*

- (8) Completion and approval or adoption of all necessary environmental clearances including those required under the California Environmental Quality Act (CEQA) and if applicable, the National Environmental Policy Act (NEPA). All applicable time periods for filing appeals or lawsuits have lapsed within 30 days after the application due date with lawsuits or appeals resolved. Proof of NEPA clearance is shown through an Authority to Use Grant Funds document.
- (A) **STI** or **TRA** components of a **Project** are not required to certify completion and demonstration of approval of environmental clearances (NEPA or CEQA) as stated in (8) above until prior to the initial disbursement of grant funds.
- (B) Applicants are not required to complete any necessary environmental clearances prompted exclusively by rental and/or operating subsidies prior to the AHSC application deadline.
- (9) Applications must demonstrate that all necessary discretionary local land use approvals, excluding design review, have been granted within 30 days of the application due date.
- (10) The application must be sufficiently complete to assess the feasibility of the proposed project and its compliance with **AHSC Program** and application requirements. For example, the applicant must demonstrate that the **Project** is financially feasible as evidenced by documentation including, but not limited to, a market study, project pro-forma, sources and uses statement, proposed operating budget, multi-year pro-forma, or other feasibility documentation that is standard industry practice for the type of proposed **Affordable Housing Development**. A market study that meets the requirements specified in the TCAC Regulations Section 10322(h)(10) will be accepted by the **Department**.
- (11) The applicant or **Developer** of the **Project** must demonstrate **Site Control** sufficient to ensure the timely commencement of the **Project** as determined by the **Department**.
- (12) Applicants must demonstrate experience by providing evidence of at least two projects that are similar to the proposed AHSC **Project** in scope and size, which have been completed by the applicant, or joint applicant, during the ten years preceding the application due date. If an Applicant relies upon the experience of its principal to meet the Applicant experience requirements,

documentation of the principal's experience is required as set forth in the application, in addition to recent project evidence described in the previous sentence.

- (A) For **STI** or **TRA** components only, an applicant may demonstrate the requisite experience (as detailed above) by using the past experience of work completed of a Locality or Transportation Agency non-applicant so long as the applicant can provide an executed agreement with that specific **Locality** or transportation agency non-applicant for the completion of the **STI** or **TRA** components of the AHSC Project for which funding is sought.
- (13) As of the date of application, the applicant(s), the **Project**, or the real property on which the **Project** is proposed may not be party to or the subject of any claim or action in the state or federal courts that affects or potentially affects the feasibility of the project. Further, the applicant(s) shall disclose and describe any claim or action undertaken by or against the applicant(s), the **Project** or the Property which affects or potentially affects the feasibility of the **Project**.
- (14) Construction of the **Project** has not commenced as of the application deadline set forth in the **NOFA**.
- (15) **Qualifying Transit** must be completed and offering service to the **Transit Station/Stop** of the **Project Area** by the time set forth in the Standard Agreement, but in no case later than the issuance of the certificate of occupancy for the **Affordable Housing Development**.
- (16) Demonstrate consistency with State Relocation Assistance Law (CA Gov Code Sec. 7260-7277).
- (17) The Housing Element for the jurisdiction in which the **Project** is located must be in substantial compliance by the date of award recommendation. Housing Element in substantial compliance means the local public entity's adopted housing element is in substantial compliance as demonstrated by a letter from the Department which sets forth findings that the housing element adopted within the time frames required by Section 65588 of the Government Code includes that substance essential to every requirement of Article 10.6, commencing with Section 65580, of Chapter 3 of Division I of Title VII of the Government Code. A jurisdiction's current housing element compliance status can be obtained by referencing the [Department's website](#). **Projects** located on Trust Land, as defined in Appendix B(a)(1), (2), are exempt from this requirement.
- (18) Applications must integrate applicable climate adaptation measures as described in Section 107(o).
- (19) The applicant must demonstrate that costs for any **Project** or component thereof will not result in loss or conversion of agricultural or other working lands or natural resource lands for other uses. The **Project** site must not be

designated as agricultural land according to the State Department of Conservation's Farmland Mapping and Monitoring Program (FMMP) Tool. An exemption to the FMMP designation may be allowed for applications that submit documentation that substantiates a description of an **Infill Site**.

- (20) Applications requesting **AHSC Program** funding for **Affordable Housing Developments** and **Housing-Related Infrastructure Capital Projects** must also demonstrate to the satisfaction of the **Department** all the following:
- (A) Rental **Affordable Housing Developments** must meet the underwriting standards in the UMRs and **MHP Guidelines** Section 7312.
 - (B) The **Affordable Housing Development** and/or **Housing-Related Infrastructure Capital Project(s)** are infeasible without **AHSC Program** funds, and other committed funds are not and will not be supplanted by **AHSC Program** funds.
 - (C) Proposed **Projects** involving new construction or **Substantial Rehabilitation** and requiring the demolition of existing residential units are eligible only if the number of bedrooms in the new **Project** is at least equal to the number of bedrooms in the demolished structures, with equal or greater affordability. The new affordable units may exist on separate parcels provided all parcels are part of the same **Project** meeting the requirements of the UMRs Section 8303 (b).
 - (i) The Department may approve **Projects** involving new construction or **Substantial Rehabilitation** and requiring the demolition of existing residential units that result in a number of bedrooms less than the number in the demolished structures where it determines that such approvals will substantially improve the livability of the remaining units, or serve some other compelling public policy objective, as long as the reduction does not result in more than 25 percent fewer units upon Project completion.
 - (D) If the **Affordable Housing Development** and/or **Housing-Related Infrastructure Capital Project(s)** involves the demolition of existing units that are affordable to lower-income households, the application must demonstrate the replacement of demolished units, comparable in size, of equal or greater affordability and equal to or greater than the number of the demolished affordable units located within comparable access to transit and include first right of return to displaced residents.
 - (E) Applicants must demonstrate the proposed **Affordable Housing Development** is consistent with State and Federal Fair Housing requirements including duties to affirmatively further fair housing.
 - (F) Where approval by a local public works department, or other responsible local agency, is required for the **Housing-Related Infrastructure Capital Project**, the application must include a statement from that department

indicating that the **Housing-Related Infrastructure Capital Project** is consistent with all applicable local rules, regulations, codes, policies and plans enforced or implemented by that **Department**.

- (21) Applications requesting AHSC Program funding for **Sustainable Transportation Infrastructure** and/or **Transportation-Related Amenities Capital Projects** must satisfy all the following:
- (A) Where approval by a local public works department, or other responsible local agency, is required for the **Project**, the application must include a statement from that entity indicating that the **Sustainable Transportation Infrastructure** and/or **Transportation-Related Amenities Capital Project(s)** is consistent with all applicable local rules, regulations, codes, policies and plans enforced or implemented by that entity.
 - (B) If the **Sustainable Transportation Infrastructure** and/or **Transportation-Related Amenities Capital Project(s)** involves the demolition of existing units that are affordable to lower-income households, the application must demonstrate the replacement of demolished units, comparable in size, of equal or greater affordability and equal to or greater than the number of the demolished affordable units located within comparable access to transit and include first right of return to displaced residents.
 - (i) The no net loss requirements contained in section 106(a)(20)(C) of these Guidelines apply to **Sustainable Transportation Infrastructure or Transportation-Related Amenities Capital Projects** occurring on a property which includes a parcel, or any portion of a parcel, on which (1) residential dwelling units affordable to lower income households currently exist, or (2) there have been dwelling units restricted to lower-income households that have been vacated or demolished within the five year period preceding the application.
- (22) Applications requesting AHSC Program funding for **Program Costs** must also demonstrate to the satisfaction of the Department all the following:
- (A) The **Program Costs** are infeasible without AHSC Program funds, and other committed funds are not being supplanted by AHSC Program funds
- (23) All proposed AHSC **Project** components are subject to all applicable codes, including the California Building Standards Code (**CCR**, Title 24). The 2019 edition of this code, effective January 1, 2020, requires mechanical ventilation systems with high efficiency filtration of Minimum Efficiency Rating Value (MERV) 13.
- (24) Outreach and education on reducing potential health impacts of air pollution must be provided to residents of **Affordable Housing Developments**. Local

health departments, air districts, and nonprofits may provide useful resources for this requirement.

- (25) **Projects** must meet the accessibility requirements specified in the TCAC regulations, as may be amended and renumbered from time to time. Exemption requests, as provided for in the TCAC regulations, must be approved in writing by the **Department** prior to the start of construction. Projects must also provide a preference for accessible units to persons with disabilities requiring the features of the accessible units in accordance with TCAC regulations. The applicant or **Developer** of the **Project** must ensure that any other applicable federal, state, and local accessibility requirements are met.

- (26) Projects involving new construction, acquisition and **Substantial Rehabilitation**, or conversion of nonresidential structures to residential dwelling units must be capable of accommodating broadband service with at least a speed of 25 megabits per second for downloading and 3 megabits per second for uploading (25/3). Internet service and its ongoing fee is not required.
 - (A) **Projects** should provide a conduit from the public right of way or property line and provide pathways, wiring, cables, and other necessary infrastructure extended to each unit and public common space to provide a broadband connection.

 - (B) For some rural areas, other technologies like fixed wireless, might offer the highest caliber connection. All applicants should consult with their local jurisdictions about their broadband infrastructure planning, as well as existing internet service providers in the area.

Section 107. Scoring Criteria

AHSC Program funds will be allocated through a competitive process, based on the merits of the application to support sustainable development that expands and improves transit, walking and bicycling infrastructure and provides opportunities to reduce VMT by supporting connectivity between housing and destinations to bring about reduction of GHG emissions.

The scoring criteria is divided by three categories, for a total of 100 points:

1. GHG Reductions Scoring (30 points)
2. Quantitative Policy Scoring (55 points)
3. Narrative-Based Policy Scoring (15 points)

Applications meeting threshold requirements as detailed in Section 106 will be reviewed and scored based upon the detailed criteria as described in Figure 5 below. The narrative-based policy scoring section of the application will be scored only for projects that obtain over 50 percent of the total points available (at least 43 of the 85 other available Quantitative and GHG-related points). Projects that are not scored for Narrative are not eligible for award. All of the scoring criteria will be applied to all **Projects**, regardless of the project components present in each specific **Project**.

To receive points related to a specific **Project** component, the component must be at least partially funded through AHSC (e.g. an applicant can only receive points related to an **Affordable Housing Development** when requesting **AHD** or **HRI** funds).

Figure 5: AHSC Scoring Elements and Criteria

Criteria	Points
GHG Reductions Scoring	
GHG Transit	5
GHG Housing, Active Transportation, and Renewable Energy	10
GHG Efficiency	15
Quantitative Policy Scoring	
Active Transportation Improvements	10
Green Buildings and Renewable Energy	10
Housing and Transportation Collaboration	9
Location Efficiency and Access to Destinations	6
Funds Leveraged	4
Anti-Displacement Strategies	6
Local Workforce Development and Hiring Practices	3
Housing Affordability Programs	5
	2
Narrative-Based Policy Scoring	
Collaboration & Planning	4
Community Benefit & Engagement	6
Community Climate Resiliency	3
Community Air Pollution Exposure Mitigation	2

(a) **Estimated GHG Emissions Reductions – 30 Points Maximum**

For this section, applications will be scored based on the estimated GHG emission reductions based on: 1) the transit **Project** GHG emission reductions; 2) the housing, active transportation, and renewable energy **Project** GHG emission reductions; AND 3) cost efficiency of total estimated GHG emission reductions per AHSC dollar. Each of these scoring methods will represent a maximum of 5, 10, and 15 points of the total combined 30 points available under this criterion, respectively.

Note: While up to 5 points are available for GHG emission reductions from transit **Projects**, the 15 points for cost efficiency of total estimated GHG emissions reductions will also be strongly affected by transit **Projects**. On average, GHG reductions from transit **Projects** make strong contributions to total **Project** GHG Emissions *Reductions in a cost-effective manner*.

Applications will be awarded points for Project GHG Emissions Reductions according to the following process:

- (1) For each **Project**, applicants will estimate GHG emission reductions using the most recent AHSC Benefits Calculator Tool, available on the California Air Resources Board's (CARB) [CCI Quantification, Benefits, and Reporting Materials webpage](#).
 - (A) Transit **Project** GHG emission reductions will represent the GHG emission reductions associated with AHSC funded new or expanded transit service, capital improvements, or fare reductions as estimated through the AHSC Benefits Calculator Tool and reviewed by State agency staff. For reductions associated with a single transit vehicle purchase, more than 50 percent of the vehicle cost must be funded by AHSC to be eligible for GHG quantification.
 - (i) In the case that multiple transit vehicles of a single mode type are purchased, all but one vehicle must be funded *entirely* by AHSC while the additional vehicle shall have more than 50 percent, but less than total cost, funded by AHSC in order to be eligible for quantification.
 - (B) Applicants are required to adhere to guidance published by CARB and SGC regarding GHG emission reductions estimates, including on how to estimate ridership growth. Guidance will be posted to [CARB's CCI Quantification, Benefits, and Reporting Materials webpage](#) and [SGC's AHSC Resource Page](#), possibly in the form of a Questions and Answers document.
 - (C) Housing, active transportation, and renewable energy **Project** GHG emission reductions will represent the GHG emission reductions associated with AHSC funded **Affordable Housing Developments** and residential transit subsidies, solar photovoltaic (PV) electricity generation, new bicycle facilities and walkways, and new or expanded bikeshare as

estimated through the AHSC Benefits Calculator Tool and reviewed by State agency staff.

- (D) Cost efficiency of estimated GHG emission reductions will be calculated by the following formula:

$$\frac{\text{Total Project GHG Emission Reductions}}{\text{AHSC \$ Request}}$$

Total **Project** GHG Reduction score will represent the total GHG emission reductions estimated through the AHSC Benefits Calculator Tool.

Note: For phased projects, only the current phase (the phase seeking AHSC funding) of a project will be quantified.

- (2) All applications will be ranked from highest to lowest within each **Project Area** type for all of the transit **Project** GHG emission reductions; housing, active transportation, and renewable energy **Project** GHG emissions reductions; and the Efficiency of Reductions score.
- (3) Each application will be assigned to one of five bins representing one fifth of the total number of applications in ranked order with each bin receiving an assigned point score, up to a maximum of (1) 5 points for transit **Project** GHG emission reductions; (2) 10 points for housing, active transportation, and renewable energy **Project** GHG emission reductions; and (3) 15 points for cost efficiency of estimated GHG emission reductions, as follows:

Transit Bin Scoring	Affordable Housing, Active Transportation, and Renewable Energy Bin Scoring	Cost Efficiency of GHG Reductions Bin Scoring
Bin 1 = 5 points	Bin 1 = 10 points	Bin 1 = 15 points
Bin 2 = 4 points	Bin 2 = 8 points	Bin 2 = 12 points
Bin 3 = 3 points	Bin 3 = 6 points	Bin 3 = 9 points
Bin 4 = 2 points	Bin 4 = 4 points	Bin 4 = 6 points
Bin 5 = 1 points*	Bin 5 = 2 points	Bin 5 = 3 points

*Transit **Projects** that result in a net increase in emissions will be placed in Bin 5 but receive 0 points for transit **Project** GHG emission reductions.

- (4) Bin scores for (1) transit **Project** GHG emission reductions; (2) housing, active transportation, and renewable energy **Project** GHG emission reductions; and (3) cost efficiency of estimated GHG emission reductions, will be combined to determine final GHG emission reduction criteria score as follows:

Transit Bin Scoring		Affordable Housing, Active Transportation, and Renewable Energy Bin Scoring		Cost Efficiency of GHG Reductions Bin Scoring
Bin 1 = 5 points		Bin 1 = 10 points		Bin 1 = 15 points
Bin 2 = 4 points		Bin 2 = 8 points		Bin 2 = 12 points
Bin 3 = 3 points	+	Bin 3 = 6 points	+	Bin 3 = 9 points
Bin 4 = 2 points		Bin 4 = 4 points		Bin 4 = 6 points
Bin 5 = 1 points*		Bin 5 = 2 points		Bin 5 = 3 points

*Transit **Projects** that result in a net increase in emissions will be placed in Bin 5 but receive 0 points for transit **Project** GHG emission reductions.

Note: For the purposes of calculating the points used to determine the GHG emission reductions score for the TOD, ICP, and RIPA targets, projects will be binned within their Project Area Type, and therefore will only compete within their project area type for the first 80 percent of appropriated funding per Section 108.

Quantitative Policy Scoring – 55 Points

(b) Active Transportation Improvements – 10 Points Maximum

- (1) Up to 2 points for the total length (in linear miles) of AHSC funded **Context Sensitive Bikeways** as follows:
 - 2 points for over half a mile
 - 1 point for less than half a mile
- (2) 1 point for **Projects** that link the **Affordable Housing Development** or **Qualifying Transit Station or Stop** to an existing bicycle network or a bicycle network identified official public planning documents. The existing or planned bicycle network must be directly linked by a new **Context Sensitive Bikeway** funded by AHSC that has an entry point within one quarter mile of either the **Affordable Housing Development** or **Qualifying Transit Station or Stop**. The existing or planned bicycle network does not have to be comprised of **Context Sensitive Bikeways**.
- (3) Up 2 points (1 point per improvement) for projects that address barriers to safe access of bicycle routes. Documentation must be provided to certify that the **Project** will do at least one of the following in an attempt to increase bicycle safety and access:
 - reduce vehicular speed or volume near bicycle users;
 - improve sight distance and visibility;
 - eliminate potential conflict points;
 - improve compliance with traffic laws; or
 - address any other barriers to cyclists that may have existed on the route.

- (4) Up to 2 points for the length of AHSC funded **Safe and Accessible Walkways** as follows:
- 2 points for over 2,000 feet
 - 1 point for 1,000 to 1,999 feet

Indicate the measured length (in feet) of new or replaced sidewalk.

STI improvements that will make walkways safe and accessible (e.g., through sidewalk replacement) will be measured for the distance of the entire block face on which the infrastructure improvement will be made so long as the entire distance of its walkway will then meet the AHSC definition of **Safe and Accessible Walkway**. Safe and accessible crosswalk improvements, which are **STI**, can be measured for the crosswalk distance plus the distance of one block face to which it connects, so long as the block face is a **Safe and Accessible Walkway**.

TRA improvements that will create **Safe and Accessible Walkways** will be measured according to the length of sidewalk directly improved (ex: provided shade to, illuminated). Unimproved distances of walkways in-between **TRA** improvements will not be measured.

- (5) 1 point for **Projects** that provide a pedestrian crossing point that directly links two pedestrian networks that are unlinked for one quarter mile along a walkable route (i.e. no connecting point for one quarter mile). Examples include overpasses, underpasses, and placement of sidewalk where none previously existed. At-grade crosswalks are not eligible for this point.
- (6) Up to 2 points for projects that address barriers to safe access of pedestrian routes. Documentation must be provided to certify that the **Project** will do at least one of the following in an attempt to increase pedestrian safety and access: reduce vehicular speed or volume near pedestrians, improve sight distance and visibility, eliminate potential conflict points, improve compliance with traffic laws, or address any other barriers to pedestrians that may have existed on the route. One point will be awarded for each addressed site of a barrier(s) to safe pedestrian access.

(c) **Green Buildings and Renewable Energy - 10 Points Maximum**

- (1) 3 points will be awarded for **Projects** that are designed to achieve green building status beyond State mandatory building code requirements as verified by a certified LEED Green rater, certified Green Point rater, or licensed engineer. Applicants may select from the following green building certification programs:

Certifications for residential construction:

Program	Tier
CalGreen	Tier 2
LEED	Gold
Green Point Rated	New Construction: Gold Rehabilitation: Whole Building
ENERGY STAR	Certified Home
Living Future Challenge	Living Building

Certifications for non-residential construction:

Program	Tier
CalGreen	Tier 2
LEED	Gold

- (2) Up to 7 points will be awarded for **Affordable Housing Developments**, or **Mixed Use Developments** in the case that non-residential uses are included, that incorporate electric design, as detailed below:

- 3 points for **Affordable Housing Developments**, or **Mixed Use Developments** that achieve near electrification – projects where two out of three of the major energy appliances (cook stoves, space heating, water heating) are electric. Projects must be wired to be electric ready, defined as having 240 volts outlets near each gas appliance.
- 7 points for **Affordable Housing Developments** or **Mixed Use Developments** that are powered entirely through electricity with no connections to natural gas infrastructure.

(d) **Housing and Transportation Collaboration - 9 Points Maximum**

- (1) Up to 6 points for applications with an AHSC funds request of at least \$1,000,000 for either **Affordable Housing Development** or **Housing-Related Infrastructure** AND an AHSC funds request for **Sustainable Transportation Infrastructure** that comprises at least a certain percentage of the total AHSC funds request as detailed below:

STI Funds Request as percentage of Total AHSC Request	Points
10%	2 points
15%	4 points
25%	6 points

- (2) 2 points for applications which invest at least 5 percent of total AHSC funds in **Transportation Related Amenities** at a **Transit Station or Stop** within the **Project Area**. One point will be given to projects that invest at least 5 percent of total AHSC funds in **Transportation Related Amenities**, but not at a **Transit Station or Stop**.

- (3) 1 point for **Projects** which have received funding from other Greenhouse Gas Reduction Fund (GGRF) programs which directly benefit or contribute to the development of the proposed **Project**.

OR

1 point for **Projects** within environmentally cleared California high speed rail station planning areas.

(e) **Location Efficiency and Access to Destinations - 6 Points Maximum**

- (1) Up to 3 points will be given for the Location Efficiency of the **Project** site as determined by the US EPA Walkability Index using the address of the **Project** site. If the **Project** is a corridor and does not have a specific address, use the center most point of the **Project** for the calculation. [Click here for the methodology for the Walkability Index](#).

Points will be given on the following scale:

- 3 points: Most Walkable (Dark Green; 15.25-20)
 - 2 points: Above Average Walkable (Light Green; 10.51-15.25)
 - 1 point: Below Average Walkable (Yellow; 5.76-10.5)
 - 0 points: Least Walkable (Orange; 1-5.75)
- (2) Up to 3 points will be given for projects that provide a map highlighting the location of existing **Key Destinations** within 1/2 mile of the AHD. Each type of **Key Destination** is worth one third of a point and may only be counted once.
- Grocery store which meets the CalFresh Program requirements
 - Medical clinic that accepts Medi-Cal payments
 - Public elementary, middle or high school
 - Licensed child care facility
 - Pharmacy
 - Park accessible to the general public
 - Public library
 - Office park
 - University or junior college
 - Bank or Post Office
 - Place of Worship

(f) **Funds Leveraged - 4 Points Maximum**

- (1) A maximum of 4 points will be awarded for applications demonstrating **Enforceable Funding Commitments** to leverage AHSC funded **Capital Projects** and **Program** activities. Applications will be scored based on the amount of **Enforceable Funding Commitments** (as defined in Appendix A with exception for tax credit equity; see below) from sources other than the **AHSC Program**, as a percentage of the requested amount of **AHSC Program** funds as follows:

Enforceable Funding Commitments as percentage of Total AHSC Request	Points
50% to 99%	1 points
100% to 149%	2 points
150% to 199%	3 points
>200%	4 points

Low-income housing tax credit equity contributions and tax-exempt bonds in connection with 4 and 9 percent low-income housing tax credits *will not* be included in this leverage equation, overriding AHSC's **Enforceable Funding Commitment** definition. For the purpose of meeting committed funding requirements detailed in Section 106(a)(7), the **Enforceable Funding Commitment** definition is used.

(g) **Anti-Displacement Strategies - 6 Points Maximum**

- (1) Up to 4 points (1 point per strategy) for **Projects** that either implement strategies or programs, or are located in jurisdictions with policies, strategies or programs that currently exist to prevent the displacement of local community residents from the area surrounding the **Project**. Each strategy or program is only eligible for fulfilling a single scoring criterion.

Applicants are required to describe the strategy or program and how it relates to the AHSC **Project**; how strategies exceed state requirements, if applicable; and who will implement any strategies under “Voluntarily Implemented by Applicants” and how they will do so.

Voluntarily Implemented by Applicants: *

- Funding a community multi-lingual tenant legal counseling service. These funds do not need to be supplied by AHSC.
- Affirmative marketing strategies or plans targeting nearby neighborhoods, a **Disadvantaged Community** or a **Low-Income Community**
- Funding and partnering with a community based organization or service provider with a history of working in the local community to conduct displacement prevention work. These funds do not need to be supplied by AHSC. The application must include an executed agreement and outline the relationship between the community based organization and applicant, one of which identifies the outcomes of the funded work.

Local Policies: **, ***

- Replacement requirements in targeted growth areas such as transit stations, transit corridors, job and housing rich areas, downtowns and revitalization areas or policies on sites identified pursuant to Government Code section 65583.2(g)(3)
- Rent stabilization programs beyond what is required by California Civil Code 1946.2
- Just cause eviction or other efforts improving tenant stability beyond what is required by California Civil Code 1946.2

- Policies to preserve Single Room Occupancy (SRO) housing or mobile home parks
- Condominium conversion restrictions
- Land banking programs actively receiving funding with a cumulative value of at least \$1,000,000
- Community benefit zoning and/or other land value recapture strategy
- Rent review board and/or mediation, foreclosure assistance, or multi-lingual tenant legal counseling services.
- Policies to facilitate the development of new accessory dwelling units.
- Density bonus ordinances that expand on state replacement requirements

* Strategies under “Voluntarily Implemented by Applicants” must be funded by an AHSC applicant.

** Strategies under “Local Policies” will only be awarded points if these policies are within local code or are ongoing programs of the local jurisdiction. All actions may only qualify for a single strategy.

*** Strategies or programs must exceed State minimum standards. Local ordinances that match or exceed legal provisions such as tenant protection laws adopted in response to COVID-19 or those included under Government Code 66300 (Housing Crisis Act of 2019) may count for points in this section so long as they are not temporary.

- (2) Up to 2 points (1 point per strategy) for **Projects** demonstrating policies, strategies or programs that either currently exist or will be implemented through this **Project** to prevent the displacement of locally-owned businesses from the area surrounding the **Project**. One point will be given for a policy, strategy, or program that either currently exists or is newly implemented through this **Project**. Two points will be given for two policies, strategies, or programs, either as one currently existing and one newly implemented through this **Project**, or both newly implemented through this **Project**. Strategies should be selected from this following list:

- Implementation of an overlay zone to protect and assist small businesses;
- Establishment of a small business advocate office and single point of contact for every small business owner;
- Creation and maintenance of a small business alliance;
- Increased visibility of the jurisdiction’s small business assistance programs;
- Formal program to ensure that some fraction of a jurisdiction’s purchases of goods and services come from local businesses;
- Prioritization of Minority and Women Business Enterprises (MWBE) for public contracting.

Local Workforce Development & Hiring Practices - 3 Points Maximum

Up to 3 points (1.5 points per strategy) for **Projects** that implement workforce development strategies. Applicants shall provide the name of the organization(s) they are partnering with, the demographic data on the population they serve, and a written agreement that details the partnership strategy or policy undertaken and its outcomes.

For maximum points in this section, **Projects** must implement at least two of the following four AHSC workforce development strategies. **Projects** that implement one of the following four AHSC workforce development strategies will receive 1.5 points.

(3) AHSC workforce development strategies include:

- Funding a workforce development organization that has a track record of success serving disadvantaged populations and can demonstrate significant job placement rates for trainees from **Disadvantaged Communities**. The workforce community based organization must submit program metrics detailing the demographics and numbers of individuals recruited, trained, and placed into state-certified apprenticeships or related jobs;
- Funding a partnership with a workforce development board that has a track record of success serving disadvantaged populations and can demonstrate significant job placement rates for trainees from **Disadvantaged Communities**. The partnership or workforce development board must submit program metrics detailing the demographics and number of individuals recruited, trained, and placed into state-certified apprenticeships or related jobs;
- **Project** is bound by a Skilled and Trained workforce commitment. Applications must submit a letter of intent between the developer and the certified apprenticeship program outlining the mechanism to deliver on the term of that commitment.
- Projects that have developed a project labor or community workforce agreement. Applications should submit documentation of those agreements, including a plan to pull a defined set of pre-apprentices from local programs with close and demonstrable connections to state-certified apprenticeships.
- **Projects** that are located in jurisdictions with local hire ordinances that directly apply to the proposed project. Application must include documentation of those requirements and a concrete plan to comply, including a specific number of targeted workers or apprenticeships to be hired, the mechanism for doing so, and the programs from which they will be pulled.

The purpose of these workforce partnerships and practices is to advance the recruitment, training, and hiring of low income residents and underrepresented workers living in **Disadvantaged Communities**, connecting these populations

with training and hiring opportunities that the funded project creates or facilitates.

Note: Projects in which every AHSC project component cannot legally implement local hire or workforce development strategies must include an explanation detailing these barriers in order to receive full points.

(h) **Housing Affordability - 5 Points Maximum**

- (1) Up to 5 points will be awarded for applications which restrict a percentage of units in the **Affordable Housing Development** to Extremely Low Income (ELI) households:

Percent of total units restricted to ELI households	Points
5% to 10%	2 points
11% to 15%	3 points
16% to 20%	4 points
>20%	5 points

(i) **Programs – 2 Points Maximum**

- (1) 1 point will be awarded to applicants that propose an AHSC funded eligible **Program**. For transit pass programs to qualify for this point, they must be offered to at least as many individuals within the community as are offered to residents of the **Affordable Housing Development**.
- (2) Up to 1 point will be awarded for applicants that provide documentation showing how the Program Operator will sustain the program beyond the term of the AHSC Program grant (three years).

Narrative-Based Policy Scoring- 15 Points

The narrative-based policy scoring section of the application will be scored only for projects that obtain over 50 percent of the Quantitative and GHG QM points (i.e., 43 points or higher). For this section, applicants must include a PDF attachment of a narrative that addresses the following questions and prompts. Please include the bolded headers listed below for each point section of the write-up; the questions should not be re-stated in the write-up. The total write-up may not exceed six pages, not including required documentation. Ensure that all relevant information for each section is included either in the response for that section, or the required documentation for that section.

(j) **Collaboration & Planning - 4 Points Maximum**

Collaboration between local governments and housing and transportation providers is critical to create a project that ensures connectivity and responds to its contexts. Outline how the proposed project brings together the efforts of local government, including housing and transportation agencies. The following prompts must be addressed in the narrative:

- (1) **Local Planning Efforts:** Identify what local planning efforts the project implements, and if applicable, describe what particular components of the project are derived from a local plan. Explain how local government agencies were involved in the process of creating the project.
- Agencies to consider in your answer may include, but are not limited to: local public works department, transit agencies, planning and community development departments, housing departments, local health department, schools/school districts, emergency services, law enforcement, etc.
 - Examples of planning efforts to discuss may include, but are not limited to: General Plan (e.g., circulation element or housing element); Specific Plan; Community Plan; Climate Action Plan; Community Health Improvement Plan (CHIP); Redevelopment Plan; Bicycle Master Plan; Disadvantaged Community Assessment (Government Code Section 65302); Pedestrian Master Plan; Local Coastal Plan; Transit Plan; Transit Corridor Plan; Station Area Plan; Corridor System Management Plan; Transportation Demand Management (TDM) Strategy or Plan.

Required Documentation: Applicable section or elements of local planning document.

- (2) **Housing and Transportation Collaboration:** Describe the relationship between the joint-applicants or partners that worked together to create the proposed AHSC **Project**. Explain the process involved in coming together to create a larger vision for the **Project Area**. Describe the integration of housing, transportation, and urban greening infrastructure components in creating a cohesive **Project**.

Required Documentation: Site Plan and project area map (or context plan).

(k) **Community Benefits & Engagement - 6 Points Maximum**

Community involvement and leadership are crucial to ensuring that both the principle objectives and co-benefits of the project respond to the true needs of local residents. Explain how local residents and community-based organizations were meaningfully engaged in developing the **Project**, especially those from **Disadvantaged** and **Low-income Communities**, and how the project addresses community-identified needs. Please address the prompts below in your narrative.

- (1) **Community Engagement and Leadership:** Describe how community-based organizations and local residents have been meaningfully involved in the visioning and development of this project. Explain in which stage(s) of the process community members and CBOs have been and will be engaged. Describe efforts to involve **Disadvantaged** and/or **Low-Income Community** residents, including how meetings were advertised and made accessible.
- (2) **Addressing Community Needs:** Demonstrate how the proposed AHSC project meets one or more identified community needs, articulating how these

needs were identified (e.g. through the community engagement process, a local needs assessment, as part of a local health department plan or other city/county plan, etc.). Address community needs beyond the provisions of housing and transportation. For **Projects** located in a **Disadvantaged Community** or **Low-Income Community**, applicants are also encouraged to cite top burdens from their CalEnviroScreen 3.0 score as community needs that their projects will address. For all **Projects**, applicants are encouraged to cite key factors contributing to less healthy community conditions from their [Healthy Places Index](#) score as community needs that their **Project** will address.

Required Documentation:

1. Letter of support from local community-based, grassroots organization, or local or Tribal health department/agency describing the community engagement process and how feedback from local residents was incorporated into the project.
2. Community Engagement Tracker: Provide additional information on events where community participation occurred in the Community Engagement Tracker template.

Note: AHSC recognizes that COVID-19 has placed significant constraints on the way engagement can be conducted. Not only is the pandemic affecting inter-personal interactions and shifting engagement to digital mediums, but it is putting a financial strain on government, developers, and community organizations, alike. Moreover, low-income and minority communities have been disproportionately affected by the dual financial and public health crises. Taking these facts into consideration, the review process will factor COVID-related constraints into the scoring process.

(I) **Community Climate Resiliency - 3 Points Maximum**

Communities will continue to experience effects of climate change in various ways, including increased likelihood of droughts, sea level rise, flooding, wildfires, heatwaves and severe weather. Due to these effects, climate resiliency is a key part of planning and project implementation decisions.

- (1) **Climate Adaptation Assessment Matrix:** Fill out the Climate Adaptation Assessment Matrix with climate projections for the listed impacts and with technical descriptions of adaptive measures to be employed. If the project is considering climate projections from data sources besides those listed below, state where the data are from and if they use different assumptions (e.g., time horizon).
- (2) **Climate Adaptation:** Describe how the risks posed from changing climate conditions will be reduced by strategies listed in the Climate Adaptation Assessment. Consider the lifetime of **Project** elements, risks posed by changing climate conditions, and consequences of those risks (e.g., impacts to occupant health and safety, structural integrity, heating and cooling systems, etc.). If your local city or county has added adaptation measures to the General Plan or other local planning documents, describe how the **Project** conforms to the implementation of that plan (Government Code section 65302(g)(4), requires cities and counties to incorporate climate considerations in the Safety Element of the General Plan or other local plan or document by January 1,

2022). Please separate responses according to climate impacts.

Note: If available, use localized climate impact projections. For tools to help assess general climate impacts, please visit [Cal-Adapt's Local Climate Snapshot tool](#).^{} For adaptation tools, resources, strategies and case studies visit the [state's Adaptation Clearinghouse](#).*

(m) **Community Air Pollution Exposure Mitigation – 2 Points Maximum**

Decreasing air pollution exposure to residents living near sources, including (but not limited to) freeways and high-volume roadways, is essential for ensuring the benefits of infill development are actualized, including promoting public health. Implementing scientifically based air pollution mitigation strategies at the project level, can help protect public health and support GHG reduction goals.

- (1) **Air Pollution Exposure Mitigation Strategies:** Identify pollutants of concern and known sources of pollution affecting the Project Area. Report the Particulate Matter (PM) 2.5, Diesel PM, Toxic Releases to Air, and Traffic Density percentiles as described in CalEnviroScreen 3.0 for the census tract in which the project will be sited.* Describe how air pollution mitigation strategies are utilized in the design of the **Project**, how they were selected, and how they address pollution sources.

Example Strategies:
Speed reduction mechanisms, including roundabouts
Traffic signal management
Design that promotes air flow and pollutant dispersion along street corridors
Solid barriers, such as sound walls or those created by continuous vegetation
MERV 16 air filtration system

Note: These strategies are limited by the many factors that may influence their effectiveness, ranging from local meteorology and topography to human use, maintenance, etc.

Note: For additional suggested strategies to mitigate air pollution exposure see the following resources:

- Bay Area Air Quality Management District, [“Planning Healthy Places”](#)
- California Air Resources Board, [“Strategies to Reduce Air Pollution Exposure near High Volume Roadways: Technical Advisory”](#)
- U.S. Environmental Protection Agency, [“Best Practices for Reducing Near-Road Air Pollution Exposure at Schools”](#)
- California Governor’s Office of Planning and Research, [“General Plan Guidelines”](#). Chapter 6- Healthy Communities
- U.S. Environmental Protection Agency [“Recommendations for Constructing Roadside Vegetation Barriers to Improve Near-Road Air Quality”](#)

- Los Angeles County Department of Public Health, [“Public Health Recommendations to Minimize the Health Effects of Air Pollution Associated with Development Near Freeways and High-Volume Roads”](#)

Note: In CalEnviroScreen 3.0, a geographic area’s percentile for a given indicator simply tells the percentage of areas with lower values of that indicator. A percentile does not describe the magnitude of the difference between two or more areas. For example, an area ranked in the 30th percentile is not necessarily three times more impacted than an area ranked in the 10th percentile.

** For a spreadsheet showing raw data and calculated percentiles for individual indicators for individual census tracts, download the [CalEnviroScreen 3.0 results](#).*

Section 108. Application Process

- (a) Pursuant to direction of the **Council**, the **Department** shall offer funds through a **NOFA** and applications will be reviewed based on the steps detailed below and illustrated in Figure 6.
- (b) The **Department** will offer optional pre-application consultations as detailed in the **NOFA** in order to provide assistance to applicants regarding minimum threshold eligibility and other program requirements.
- (c) Applications will be made available through the **Department**, and complete applications must be submitted to the **Department** by the deadline detailed in the **NOFA**.
- (d) The highest scoring applications that meet all threshold requirements as determined by the **Department**, based on criteria set forth in these guidelines, shall be recommended to the **Council** for funding as specified in the **NOFA**. The **Council** will make adjustments in this procedure to meet the following objectives:
 - (1) At least fifty (50) percent of **AHSC Program** expenditure for **Projects** benefitting and located in **Disadvantaged Communities**. **Projects' Disadvantaged Community** status are based upon the location of their AHSC funded **Affordable Housing**.
 - (2) At least fifty (50) percent of the annual proceeds appropriated for the **AHSC Program** shall be expended for affordable housing. For the purposes of this set-aside, expenditures related to **Affordable Housing Development** and **Housing-Related Infrastructure Capital Projects** shall count toward this requirement.
 - (3) **Project Area** type targets are as follows:
 - (A) Target thirty five (35) percent of funds available as designated in the **NOFA** to **TOD Project Area** applications.
 - (B) Target thirty five (35) percent of funds available as designated in the **NOFA** to **ICP Project Area** applications.
 - (C) Target ten (10) percent of funds available as designated in the **NOFA** to **RIPA** applications.
 - (D) Remaining twenty (20) percent of available funds may be awarded to any eligible project area type.
 - (i) The **Council** will use discretionary funds to fulfill statutory investment minimums for **Disadvantaged Communities** and affordable housing as detailed in (1) and (2), above. Once these minimums are met, the **Council** will use discretionary funds to ensure a distribution of total AHSC funds that allows for all geographic areas, as defined in (4), below, with competitive applications to receive funds.

- (E) To the extent applications received are not sufficient to meet **TOD Project Area, ICP Project Area or RIPA** targets detailed in (A), (B) and (C) above, the **Council** reserves the right to waive these requirements and recommend funding a greater percentage of applications in either of the three identified **Project Area** types. Additionally, the **Council** reserves the right to waive project area targets in order to fulfill investment minimums for **Disadvantaged Communities** and affordable housing as detailed in (1) and (2), above, as well as to ensure a distribution of funds that allow for all geographic areas, as defined in (4), below, with competitive applications to receive funds.
- (4) The **Council** strives to achieve a diverse distribution of resources and recognizes that in order to meet the State’s environmental commitments, GHG emissions reductions must be made in all regions of the State. The **Council** will use discretionary funds, as described in (d), above, to ensure a distribution of total AHSC funds that allows for all geographic areas with a competitive application to receive funds.

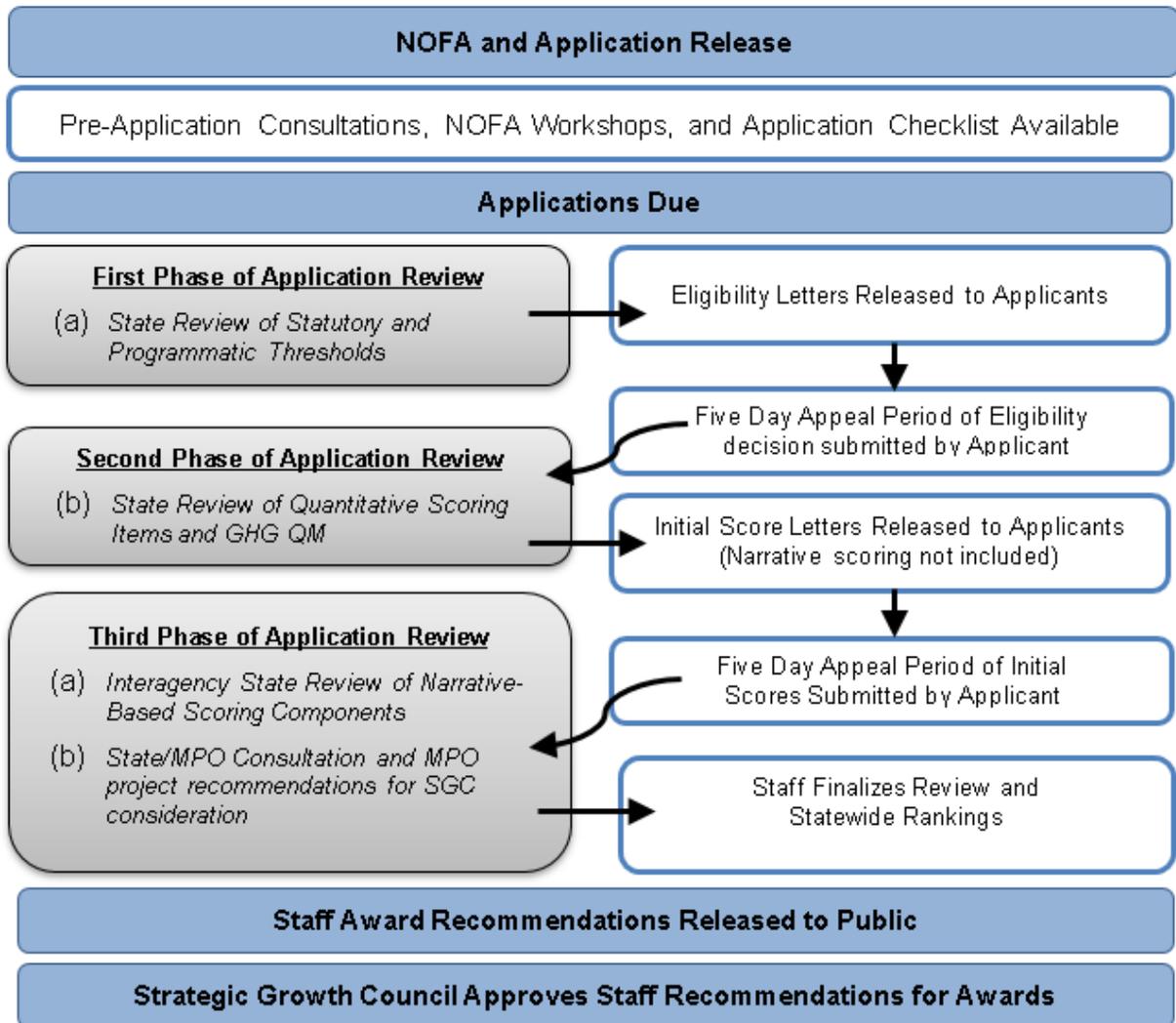
AHSC defines geographic areas as follows:

Geographic Area	Counties
Sacramento Area	Sacramento, Yolo, Sutter, Yuba, Placer, El Dorado
San Diego Area	San Diego
San Francisco Bay Area	Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, Sonoma
San Joaquin Valley	Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus, Tulare
Coastal Southern California	Los Angeles, Orange
Inland Southern California	Riverside, San Bernardino, Imperial
Central Coast	Ventura, Santa Barbara, San Luis Obispo, Monterey, San Benito, Santa Cruz
North State & Sierras	Alpine, Amador, Butte, Calaveras, Colusa, Del Norte, Glenn, Humboldt, Inyo, Lake, Lassen, Mariposa, Mendocino, Modoc, Mono, Nevada, Plumas, Shasta, Sierra, Siskiyou, Tehama, Trinity, Tuolumne

Note: The Council is committed to ensuring access to AHSC funding across the State’s diverse geographic areas. In future rounds, AHSC staff will evaluate all aspects of AHSC scoring, project area classification, and GHG quantification to assess changes needed to account for each region’s ability to produce competitive AHSC applications relative to their existing conditions.

- (5) Regardless of **Project Area** type, the Council will seek to fund one project, in the tribal funding target, per funding cycle to a **Qualified Tribal Entity**. In order to be considered for the Tribal funding target, a **Qualified Tribal Entity** must be the **Developer** for the **AHD** and/or **HRI** components, or the project partner responsible for **STI** and/or **TRA** components. Projects where the only **Qualified Tribal Entity** is an applicant for **Program Costs** will not be considered for the Tribal funding target. The **Project** must meet the requirements laid out in Appendix B in order to qualify for the Tribal funding target. Unless stated otherwise, the **Project** must meet all AHSC Program requirements. The **Project** will contribute to the relevant **Project Area** type and geographic funding targets. If multiple **Federally Recognized Native American Tribes** apply for **Projects**, the Council will apply the scoring criteria from these Guidelines to rank the **Projects** such that the top-ranked **Project** will be awarded under the Council's Tribal target and the remaining **Project(s)** will compete in their respective **Project Area** types.
 - (6) A single **Developer** may be awarded no more than \$60 million per **NOFA** funding cycle, however this limitation may be waived if necessary to meet AHSC statutory funding set-asides.
 - (7) As station area plans for High Speed Rail are implemented, the **Council** may prioritize investments in these areas.
 - (8) The **Department** may elect to not evaluate compliance with some or all threshold requirements for applications that are not within a fundable range.
 - (9) In the event of two or more applications having the same scores, the Council has the discretion to make the final selection regarding these projects to ensure alignment with the objectives set out in these **AHSC Program** Guidelines.
 - (10) Applications recommended for funding and approved by the **Council** are subject to conditions specified by the **Department**. Applicants will receive an official letter of award after funding recommendations are approved by the **Council**.
 - (11) Applications will be treated in accordance with Public Records Act. Certain information, in accordance with the Public Records Act, may be publicly disclosed.
- (e) Metropolitan Planning Agency Role in Application Review
- (1) To support implementation of an applicable SCS and consistency with activities or strategies identified in a regional SCS, or similar planning document that demonstrate a per capita reduction in VMT and GHG, as allowed by SB 862 (Chapter 36, Statutes of 2014), an MPO/region may develop its own process prior to the application due date to identify and recommend applications that have the highest regional priorities based on criteria established by the MPO/region.

Figure 6: AHSC Program Application Review Process



Article III. Legal and Reporting Requirements

Section 109. Legal Documents

- (a) **Rental Affordable Housing Developments:** Upon the award of **AHSC Program** funds to assist a rental **Affordable Housing Development**, the **Department** shall enter into one or more agreements with the applicant, which may be in the form a State of California Standard Agreement (Standard Agreement), which shall commit funds from the **AHSC Program** in an amount sufficient to fund the approved **AHSC Program** loan amount. The agreement or agreements shall contain the following:
- (1) A description of the approved **Affordable Housing Development** and the permitted uses of **AHSC Program** funds;
 - (2) The amount and terms of the **AHSC Program** loan;
 - (3) The regulatory restrictions to be applied to the **Affordable Housing Development** through the **Regulatory Agreement**;
 - (4) Special conditions imposed as part of the **Department's** approval of the **Affordable Housing Development**;
 - (5) Requirements for the execution and the recordation of the agreements and documents required under the **AHSC Program**;
 - (6) Terms and conditions required by federal and state law;
 - (7) Requirements regarding the establishment of escrow accounts for the deposit of documents and the deposit and disbursement of **AHSC Program** loan proceeds;
 - (8) the approved schedule of the **Affordable Housing Development**, including land acquisition if any, commencement and completion of construction or rehabilitation work, and occupancy by eligible households;
 - (9) Terms and conditions for the inspection and monitoring of the **Project** in order to verify compliance with the requirements of the **AHSC Program**;
 - (10) Provisions regarding tenant relocation in accordance with State law;
 - (11) Provisions relating to the placement of a sign on or in the vicinity of, the **Affordable Housing Development** site indicating that the **Council** has provided financing for the **Affordable Housing Development**. The **Council** may also arrange for publicity of the **AHSC Program** loan in its sole discretion;
 - (12) Provisions to ensure that the eligible costs and use of **AHSC Program** funds maintain the required GHG Reduction represented in the application;
 - (13) Other provisions necessary to ensure compliance with the requirements of the **AHSC Program**;

- (14) Description of the conditions constituting breach of the agreement(s) and remedies available to the parties thereto; and
 - (15) Any of the **Department's** standard contractual terms that may be applicable.
- (b) For rental **Affordable Housing Developments**, the **Department** shall enter into a single **Regulatory Agreement** with the applicant for not less than the original term of the loan that shall be recorded against all sites comprising the property of the **Affordable Housing Development** prior to the disbursement of funds. The **Regulatory Agreement** shall include, but not be limited to, the following:
- (1) The number, type and income level of **Restricted Units**;
 - (2) Standards for tenant selection pursuant to 25 **CCR** 8305;
 - (3) Provisions regulating the terms of the rental agreement pursuant to 25 **CCR** 8307;
 - (4) Provisions related to a Rent Schedule, including initial rent levels for **Restricted Units** and non-Restricted Units pursuant to subsections (a) and (b) of **MHP Guidelines** Section 7312;
 - (5) Conditions and procedures for permitting rent increases pursuant to **MHP Guidelines** Section 7312;
 - (6) Provisions for limitations on Distributions pursuant to 25 **CCR** 8314 and on developer fees pursuant to 25 **CCR** 8312;
 - (7) Provisions regarding the deposit and withdrawal of funds to and from reserve accounts in accordance with 25 **CCR** 8308 and 8309;
 - (8) Assurances that the **Affordable Housing Development** will be maintained in a safe and sanitary condition in compliance with state and local housing codes and the management plan, pursuant to **MHP Guidelines** Section 7324;
 - (9) Description of the conditions constituting breach of the **Regulatory Agreement** and remedies available to the parties thereto;
 - (10) Provisions governing use and operation of non-Restricted Units and common areas to the extent necessary to ensure compliance with AHSC Program requirements;
 - (11) Special conditions of loan approval imposed by the **Department**;
 - (12) "Program Operations," **MHP Guidelines** Sections 7321 through 7326, shall apply to rental **Affordable Housing Developments** assisted by the **AHSC Program**; and
 - (13) Other provisions necessary to assure compliance with the requirements of the **AHSC Program**.

- (c) All **AHSC Program** loans for assistance to rental **Affordable Housing Developments** shall be evidenced by a promissory note payable to the **Department** in the principal amount of the loan and stating the terms of the loan consistent with the requirements of the **AHSC Program**. The note shall be secured by a deed of trust on the **Affordable Housing Development** property naming the **Department** as beneficiary or by other security acceptable to the **Department**; this deed of trust or other security shall be recorded junior only to such liens, encumbrances and other matters of record approved by the Department and shall secure the **Department's** financial interest in the **Affordable Housing Development** and the performance of applicant's **AHSC Program** obligations.
- (d) Grants shall be governed by a Standard Agreement or other agreement with the **Recipient** in a form prescribed by the **Department**. The agreement shall ensure that the provisions of these Guidelines are applicable to the **Project** covered by the agreement and enforceable by the **Department**. The agreement will contain such other provisions as the **Department** determines are necessary to meet the requirements and goals of the **AHSC Program**, including but not limited to the following:
- (1) A description and sources and uses of the approved **Project** and the permitted uses of **AHSC Program** funds;
 - (2) Provisions governing the amount, terms and conditions of the **AHSC Program** grant;
 - (3) Provisions governing the construction work and, as applicable, the acquisition and preparation of the site of the **Capital Project**, and the manner, timing and conditions of the disbursement of grant funds;
 - (4) A schedule for completion of the **Project** and a series of milestones for progress toward **Project** completion together with the remedies available to the **Department** in the event of the failure to meet such milestones;
 - (5) Provisions for the payment of prevailing wages if and as required by state or federal law;
 - (6) Requirements for periodic reports from the **Recipient** on the construction and use of the **Project** and provisions for monitoring of the **Project** by the **Department**;
 - (7) The **Recipient's** responsibilities for the development of the approved **Project**, including, but not limited to, construction management, maintaining of files, accounts and other records, and report requirements;
 - (8) Provisions relating to the development, construction, affordability and occupancy of the **Affordable Housing Development** supported by the **Housing-Related Infrastructure Capital Project**, if applicable;

- (9) Provisions relating to the placement on, or in the vicinity of, the **Project** site, a sign indicating that the **Council** has provided financing for the **Project**. The **Council** may also arrange for publicity of the grant in its sole discretion;
- (10) Remedies available to the **Department** in the event of a violation, breach or default of the Standard Agreement;
- (11) 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 **AHSC Program** grant or loan or both;
- (12) Special conditions imposed as part of **Department** approval of the project;
- (13) Terms and conditions required by federal or state law;
- (14) Provisions to ensure that the **Project** maintains the required **GHG Reduction** as represented in the application; and
- (15) Other provisions necessary to ensure compliance with the requirements of the **AHSC Program**.

Section 110. Reporting Requirements

- (a) During the term of the Standard Agreement and according to the annual deadline identified in the Standard Agreement, the **Recipient** shall submit, upon request of the **Department** and the **Council**, an annual performance report that demonstrates satisfaction of all reporting requirements pursuant to the **AHSC Program** reporting requirements identified in the Standard Agreement. Recipient shall also submit the reports required by **MHP Guidelines** Sections 7325 and 7326 and any additional reporting requirements developed by the **Department**, the **Council** or **ARB**. The reports will be filed on forms provided by the **Department**.
- (b) **Recipient** is responsible for meeting the applicable project reporting requirements of CARB's *Funding Guidelines for Agencies that Administer California Climate Investments* as well as CARB's AHSC Program Quantification Methodology and Benefits Calculator Tool. These may include, but are not limited to: **Project** metrics; the duration over which the **Recipient** will track **Project** metrics; frequency of reporting; the format **Recipient** will use to report; **Project** profile information; **Project** benefit information; and information related to **Priority Population** benefits.
- (1) Award recipients are required to submit estimates of jobs supported by their projects using CARB's Jobs Co-Benefit Assessment Methodology within 90 days of award. This methodology will estimate the number of jobs supported by the AHSC investment based upon the **Project's** budget.
- (2) Consistent with the *2018 Funding Guidelines for Agencies that Administer California Climate Investments*, AHSC funding recipients must track and report the employment outcomes of their projects. Award recipients will be required to conduct **Employment Benefits and Outcomes Reporting** for employment benefits and outcomes created supported by the AHSC investment and all leveraged funding, while accommodating provisions for data privacy. Once funds are disbursed, reporting may occur as frequently as an annual basis. AHSC Program staff will work with applicants to clarify what the jobs reporting process may look like.

Recipients must report on all jobs created as a result of the construction or delivery of the AHSC projects. This includes all jobs created, regardless of their funding source, that are used for delivering project components funded at least in-part by AHSC. The project's total development costs reported in the AHSC Application Workbook contains the scope of the AHSC funded project and all jobs created by it.

Recipients must report annually on all jobs created **from the date the standard agreement is executed** and continues until the following milestones are reached.

- Grant Standard Agreement: all funds are disbursed
- Loan Standard Agreement: project converts to permanent financing

Recipients must specify jobs created by AHSC that employ individuals who live within priority population census tracts or low-income households. To identify individuals who live within priority populations census tracts or in low-income households, refer to the “Read Me” tab of the AHSC Jobs Reporting Template, [posted on SGC AHSC webpage](#).

Recipients must ensure that all subcontractors receiving \$100,000 or more, AHSC funds or otherwise, from the AHSC recipient must report on jobs created by the project. Reporting must be completed using the AHSC_Jobs Reporting Template provided by SGC.

Reporting will be done according to both trade and classification and include the following:

- Job education required*
- Job experience required*
- Job training credentials*
- Number of jobs provided*, **
- Total project work hours*, **
- Average hourly wage*, **
- Total number of workers that completed job training*, **
- Employer paid health insurance provided*
- Paid leave*
- Retirement plan*
- Targeted hiring strategy*

**Please refer to the “Data Dictionary” tab in the AHSC Jobs Reporting Template for a description of each of the reporting categories listed above.*

***Each of these statistics must also be reported according to workers defined as belonging to a **Priority Population**.*

- (3) Consistent with the *2018 Funding Guidelines for Agencies that Administer California Climate Investments*, AHSC funding recipients must report on all outcomes resulting from the AHSC **Projects**. This includes metrics related to **AHD/HRI, STI, and TRA Projects**. **Projects** will be selected for outcomes reporting at the discretion of the **Council**.

Reporting will include the following components and other metrics as requested, for a duration of no more than five (5) years:

- **AHD/HRI Project** metrics:
 - Project operational date
 - Outcome tracking start date
 - Housing unit occupancy rate
 - Income restricted housing unit occupancy rate
 - Mode share of all residents (i.e., transit, bicycling, walking, driving)

- Mode share of Low-income residents
 - Residents using transit passes
 - Occupancy of commercial space
 - **STI** and **TRA** transit **Project** metrics:
 - Average daily ridership of transit
 - **STI** active transportation **Project** metrics:
 - Average traffic of bicycle and pedestrian facilities
 - Days of operational per year
- (c) At any time during the term of the Standard Agreement, 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. The State of California has the right to review project documents and conduct audits during project implementation and over the project life.

Section 111. Performance Requirements

- (a) **Recipients** shall begin construction of the housing units to be developed in the **Affordable Housing Development** that is a **Capital Project** and the housing designated in the application within the time set forth in the Standard Agreement but not later than November 30, 2024.
 - (1) **Recipients** may request extensions of the performance requirement in Section 111(a) by addressing a letter to SGC's Executive Director explaining the circumstances for why an extension is needed and detailing a plan for meeting the extended performance requirement deadline. At the discretion of SGC's Executive Director, an extension of up to two (2) years may be granted.
- (b) The housing units developed in the **Affordable Housing Development** that is a **Capital Project** and the housing designated in the application must be completed, as evidenced by receipt of a certificate of occupancy, within the period of time set forth in the Standard Agreement, but not later than November 30, 2027.
 - (1) **Recipients** may request extensions of the performance requirement in Section 111(b) by addressing a letter to SGC's Executive Director explaining the circumstances for why an extension is needed and detailing a plan for meeting the extended performance requirement deadline. At the discretion of SGC's Executive Director, an extension of up to two (2) years may be granted.
- (c) **AHSC Program** funds must be disbursed in accordance with deadlines specified in the Standard Agreement, and in no event later than the disbursement deadlines outlined in the **NOFA**.
- (d) **Recipients** may only reapply for **AHSC Program** funds in a subsequent **NOFA** for the same **Project** if the **Recipient** has disbursed at least fifty (50) percent of the funds allocated from prior awards.
- (e) Negative points will be assessed against the Developer on subsequent AHSC applications if the Project does not comply with the dates set in the Standard Agreement for the performance requirements described in Section 111(a) or Section 111(b).

Section 112. 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 **Recipient** 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 **AHSC Program** requirements.
 - (2) The **Department** may seek such other remedies as may be available under the relevant agreement or any law.
- (b) The **Department** may cancel funding commitments and Standard Agreements under any of the following conditions:
- (1) The objectives and requirements of the **AHSC Program** cannot be met by continuing the commitment or Standard Agreement;
 - (2) Construction of the **Capital Project** or implementation of **Program Costs** 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 113. Prevailing Wages

For the purposes of the State Prevailing Wage Law (Labor Code Sections 1720 – 1781), a grant or loan under the **AHSC Program** shall be considered public funding for the construction, rehabilitation, demolition, relocation, preservation, or other physical improvement of the **Capital Project** subject to the provisions of the State Prevailing Wage Law. AHSC Program funding of the **Project** shall not necessarily, in and of itself, be considered public funding of a **Project** unless such funding is considered public funding under the State Prevailing Wage Law. It is not the intent of the **Department** in these regulations to subject **Projects** to the State Prevailing Wage Law by reason of **AHSC Program** funding of the **Project** in those circumstances where such public funding would not otherwise make the **Project** subject to the State Prevailing Wage Law. Although the use of **AHSC Program** funds does not require compliance with federal Davis Bacon wages, other funding sources may require compliance with federal Davis Bacon wages.

Appendix A. Definitions

- (a) “Active Transportation” means infrastructure and non-infrastructure projects that encourage increased use of active modes of transportation, but does not include funding program operations. The project types include but are not limited to:
 - (1) Infrastructure Projects: capital improvements (construction) that will encourage increased use of active modes of transportation, such as biking and walking.
 - (2) Non-infrastructure Projects: education, encouragement and planning activities must encourage increased use of active modes of transportation, such as biking and walking.
- (b) “Active Transportation Program” means non-infrastructure related programs which instill safe pedestrian, bicyclist and motorist behaviors to make safe active transportation possible. Non-infrastructure activities can stand-alone or be conducted with infrastructure projects (fixed facilities or permanent structural changes) to increase effectiveness.
- (c) “Activity Delivery Costs” means staff costs incurred by the Public Agency that are directly related to implementing specific Capital Project and Program Costs. They may include costs such as project document preparation, project underwriting, construction management, inspections, or reporting to the Department.
- (d) “Affordable Housing Development” means a Capital Project that is a Housing Development in which at least 20 percent of the total units are Affordable Units.
- (e) “Affordable Unit” means a housing unit that satisfies all the following criteria:
 - (1) The unit must satisfy one of the following affordability criteria:
 - (A) It is available at an “affordable rent” as that terms is used and defined in Section 50053 of the Health & Safety Code;
 - (B) It is offered at an “affordable housing cost”, as that terms is used and defined in Section 50052.5 of the Health & Safety Code; or
 - (C) It is available at an “affordable rent” or an “affordable housing cost” according to the alternative percentages of income for agency-assisted rental and cooperative housing developments pursuant to Department regulations adopted under Health and Safety Code section 50462(f).
 - (2) For “Affordable Units” that are rental units, they must be subject to a recorded Program covenant ensuring affordability for a duration of at least 55 years.
 - (3) For “Affordable Units” that are ownership units, they must be sold to and occupied by an income-qualified household, and subject to a recorded covenant with a duration of at least 30 years that includes either a resale restriction or equity sharing upon resale.

- (4) For the purposes of this definition, the terms “persons and families of low income” and “area median income” shall have the same meanings as set forth in Health and Safety Code section 50093 and 50093(c).
- (5) The unit must be occupied by a “lower income household” as defined by Health and Safety Code section 50079.5, which includes “very low income households” as defined by Health and Safety Code section 50105 and also includes “extremely low income households” as defined by Health and Safety Code section 50106.
- (f) “AHSC Program” means the program as outlined by these Program Guidelines.
- (g) “Area Median Income” means the most recent applicable county median family income published by the **TCAC**.
- (h) “Assisted Unit” means a unit that is subject to the **Program’s** rent and/or occupancy restrictions as a result of the financial assistance provided by the **Program**, as specified in the **Regulatory Agreement** entered into with the **Department**.
- (i) “Bus Rapid Transit” (BRT) means a rubber-tired form of rapid transit in an integrated system of facilities, equipment, services, and amenities that exceed the speed and reliability of regular bus service. BRT usually includes use of dedicated right-of way, including busways, exclusive lanes, and bypass/queue jumping lanes for buses at congested intersections to reduce vehicle running time and typically includes a combination of the following additional features: (1) center of road alignment, mixed-traffic prohibitive intersection treatments; (2) use of more limited-stop service including express service and skip-stopping; (3) application of Intelligent Transportation Systems (ITS) technology such as signal priority, automatic vehicle location systems, system security, and customer information; (4) platform level boarding and (5) off-board fare collection.
- (j) “Bus Service” means regularly scheduled public transit service operating with limited stops using a fixed route.
- (k) "Capital Project" means a project consisting of the construction, rehabilitation, demolition, relocation, preservation, acquisition, or other physical improvement that is an integral part of, or is necessary for completion of a Project.
- (l) “CCR” means the California Code of Regulations.

- (m) “Context Sensitive Bikeway” means on-street infrastructure for bicycle riding that is appropriately applied based on the traffic volumes and speeds on a specific street, as [recommended by the California Department of Transportation](#) based on guidance from the Federal Highway Administration, American Association of State Highway and Transportation Officials, and the California Highway Design Manual:

Place Type and Surrounding Land-Use		Posted Speed			
		15-20	25-30	35-45	> 45
Urban Areas & Suburban Main Streets	<2,500	Standard Shoulder or Shared Lane	Standard Shoulder or Shared Lane	Class II or Class IV	Class IV
	2,500-5,000				
	5,000-10,000	Class II or Class IV	Class II or Class IV	Class IV	
	>10,000	Class IV	Class IV		
Rural Areas (Developing Corridors)		15-20	25-30	35-45	> 45
	<2,500	Standard Shoulder (may be designated as a Class III facility):			
	2,500-5,000				
	5,000-10,000				
	>10,000				
	15-20	25-30	35-45	> 45	
Rural Main Streets	<2,500	Standard Shoulder or Shared Lane	Class II	Class II	Class I or IV
	2,500-5,000				
	5,000-10,000	Class II		Class II	
	>10,000	Class II			

- (1) Class I bicycle paths are considered **Context Sensitive Bikeways** at any ADT and posted speed.
 - (2) **Projects** may consider either the design year or post-**Project** implementation conditions for posted speed and ADT.
 - (3) For AHSC scoring purposes, “Rural Main Streets” shall be considered any roadway within one-quarter (1/4) of a mile of federal, state, or county highway within a **Rural Area**.
- (n) “Council” means the California Strategic Growth Council, established pursuant to Public Resources Code Section 75121.
- (o) “Currently Developed” means that the land in question is altered by paving, construction, and/or land use that would typically have required regulatory permitting to have been initiated.
- (p) “Deferred Costs” means costs deferred at construction loan closing, including but not limited to: capitalized reserves, loan fees, syndication costs, legal, accounting, audit, consultant fees, and developer fees paid from operating cashflow.
- (q) “Department” means the Department of Housing and Community Development of the State of California.
- (r) “Developer” means the entity that the Department and the Council rely upon for experience, site control, and capacity, and which controls either (1) the Affordable Housing Development during development and through occupancy, (2) the Housing-Related Infrastructure during development and through completion, or (3) the Sustainable Transportation Infrastructure and Transit-Related Amenities during development and through operation.

- (s) “Disadvantaged Community” means a census tract with a score in the top 25 percent or one of the 22 additional census tracts that score in the highest 5 percent of Pollution Burden as identified in California Environmental Protection Agency’s CalEnviroScreen 3.0 tool.
- (t) “Employment Benefit and Outcome Reporting” means submission of data about the jobs and related benefits created by the AHSC Investment as required by the [Funding Guidelines for Agencies Administering California Climate Investments](#).
- (u) “Enforceable Funding Commitment” means permanent commitments, including but not limited to the following:
 - (1) Low-income housing tax credit equity contributions (without the necessity of a tax credit reservation letter) and tax-exempt bonds in connection with 4 and 9 percent low-income housing tax credits, will be considered committed in this calculation. The applicant must submit a valuation of their anticipated tax credit equity which documents both the proportion of the **Affordable Housing Development** purchased and assumed tax credit price.
 - (2) Funds conditionally reserved under the following programs shall be accepted as funding commitments: the Department of Housing and Urban Development’s (HUD) Supportive Housing Program (SHP), HOME Investment Partnerships Program (HOME), Community Development Block Grant Program (CDBG), and the California Department of Mental Health’s Mental Health Services Act (MHSA) Program.
 - (3) A land donation in fee for no other consideration that is supported by an appraisal or purchase/sale agreement (“Land Donation”) or a local fee waiver resulting in quantifiable cost savings for the Project where those fees 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 of 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.
 - (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 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 capital improvement plan consistent with the terms and timeframes of the Standard Agreement.

- (v) “Energy Efficiency” means managing and restraining the growth in energy consumption.
- (w) “Federally Recognized Native American Tribe” means Native American native tribe, band, nation, pueblo, village or community that the Secretary of the Interior acknowledges to exist as an Native American tribe, pursuant to the Federally Recognized Native American Tribe List Act of 1994, 25 U.S.C. 479a.
- (x) “Flexible Transit Service” means a form of transit for the public characterized by flexible routing and scheduling of small/medium vehicles operating in shared-ride mode (with at least two passengers) between pick-up and drop-off locations according to passenger needs. Flexible Transit Service includes vanpool, shuttle, paratransit, and feeder bus systems that reduce vehicle miles travelled.
- (y) “Floor Area Ratio” (FAR) means the square footage of the floor area of a building divided by the site square footage, excluding therefrom dedicated streets, sidewalks, parks and open space. The floor area of a building is the sum of the gross area of each floor of the building, excluding mechanical space, cellar space, floor space in open balconies, enclosed parking and elevators or stair bulkheads. Multiplying the FAR by the area of the site produces the minimum amount of floor area required in a building on the lot. For example, on a 10,000 square-foot site in a district with a minimum FAR of 1.5, the floor area of a building must be at least 15,000 square feet.
- (z) “Greenhouse Gas Reduction” (GHG Reduction) means actions designed to reduce emissions of one or all of the following gases: carbon dioxide, methane, nitrous oxide, hydrofluorocarbons, perfluorocarbons, and sulfur hexafluoride.
- (aa) “Green Streets” means a sustainable stormwater strategy that meets regulatory compliance and resource protection goals by using a natural systems approach to manage stormwater, reduce flows, improve water quality and enhance watershed health.
- (bb) “High Quality Transit” means a Qualifying Transit line with high frequencies AND permanent infrastructure as follows:
 - (1) Frequency: High Quality Transit must have Peak Period headway frequency on the same route of every 15 minutes or less and service seven days a week. This level of service must have been publicly posted by the provider at some point between January 2020 and the time of application.
 - (2) Permanent Infrastructure: High Quality Transit must operate on a railway or be transit service with Bus Rapid Transit features that either fully or partially operate on a dedicated bus-only lane, or uses High Occupancy Vehicle (HOV) or High Occupancy Toll (HOT) lanes.
- (cc) “Housing Development” means a residential development or the residential portion of a mixed-use development.

- (dd) “Housing-Related Infrastructure” means a capital infrastructure improvement required as a condition of approval of an affordable housing development by a Locality, transit agency or special district such as sewer, water or utility system upgrades, streets, drainage basins, etc.
- (ee) “Infill Site” means a site for which at least three of four sides or 75 percent of the perimeter of the site adjoins parcels that are **Currently Developed** qualified **Urban Uses**. In counting this, perimeters bordering navigable bodies of water and improved parks shall not be included. In order to qualify as an infill site, the site must also be located in an urbanized area meaning that it fulfills one of the following requirements:
 - (1) located within an incorporated city according to an official City or County map, OR
 - (2) located within an urbanized area or urban cluster as defined by the [U.S. Census Bureau](#), OR
 - (3) for unincorporated areas outside an urbanized area or urban cluster, the area shall 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.
- (ff) “Integrated Connectivity Project (ICP) Project Area” means a Project Area which includes at least one (1) Transit Station/Stop with a combination of two or more eligible costs as defined in Section 103.
- (gg) “Intelligent Transportation Systems” means electronics, communications, or information technology, used singly or in combination, to improve the efficiency, accessibility or safety of the surface transportation system.
- (hh) “Key Destinations” means vital community amenities and resources including medical centers, schools, grocery stores, child care centers, pharmacies, public parks, or public libraries. Key Destinations must be operational at the time of application. This definition differs from “Activity Centers” as used in the AHSC Benefits Calculator Tool.
- (ii) “Locality” means a California city, unincorporated area within a county or a city and county.
- (jj) “Lower Income” has the meaning set forth in Health and Safety Code Section 50079.5.
- (kk) “Low-Income Community” means a census tract with either 1) median household incomes at or below 80 percent of the statewide median income, or 2) median household income at or below the threshold designated as low-income by Department of Housing and Community Development’s State Income Limits pursuant to the Health and Safety Code Section 50093.
- (ll) “Low-Income Households” mean individual households with either 1) household incomes at or below 80 percent of the statewide median income, or 2) household incomes at or below the threshold designated as low-income by Department of

Housing and Community Development's State Income Limits adopted pursuant to Health and Safety Code Section 50093.

- (mm) "Mixed Use Development" means a building, combination of buildings, or building complex, designed to functionally and physically integrate non-residential uses such as retail, commercial, institutional, recreational, or community uses with residential uses, in a complementary manner.
- (nn) "Moderate Income" has the meaning set forth in Health and Safety Code Section 50093.
- (oo) "MHP" shall mean the Multifamily Housing Program authorized and governed by Sections 50675 through 50675.14 of the Health and Safety Code, and the MHP Guidelines dated June 19, 2019.
- (pp) "Natural Infrastructure" means the preservation and/or restoration of ecological systems, or utilization of engineered systems that use ecological processes, to increase resiliency to climate change and/or manage other environmental problems. Some examples relative to AHSC could include street trees and greenspace for water catchment, infiltration and surface cooling; water treatment facilities that utilize ecologically functioning wetlands; flood mitigation systems that utilize the natural floodplain and stable shorelines used in tandem with constructed flood barriers.
- (qq) "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, public drainage facilities, and utility easements. Areas that are non-developable due to natural landscape features (ex: steep grade) are allowable deductible areas so long as the size and location of the non-developable area is identified by a licensed surveyor. Non-allowed deductible areas include 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.
- (rr) "NOFA" means a Notice of Funding Availability issued by the Department.
- (ss) "Peak Hours" or "Peak Period" means the period with the highest ridership during the entire transit service day as determined by the transit operator. Must include at least one hour during the morning commute hours and one during evening commute hours, Monday through Friday. Each Peak Period cannot be longer than three hours.
- (tt) "Performance measures" means indicators of transit regarding data indicators such as accessibility, mobility choices and ridership.
- (uu) "Priority Population" means residents of: (1) census tracts identified as disadvantaged by California Environmental Protection Agency per SB 535; (2) census tracts identified as low-income per AB 1550; or (3) a low-income household per AB 1550. See the [Priority Population maps](#) for more information.

- (vv) "Program Cost" means the cost(s) associated with 1) program creation, or 2) expansion of existing programs to serve new populations or offer new program service and implementation.
- (ww) "Program Operator" means the entity that administers the day-to-day operational responsibilities for the program for which the AHSC Program funding is sought.
- (xx) "Project" means the proposed use of funds representing a combination of Capital Projects or Program Costs which are proposed by the applicant to be funded the AHSC Program.
- (yy) "Project Area" means the area encompassing the Transit Station/Stop, housing and Key Destinations.
- (zz) "Public Agency" means a Locality, transit agency, public housing authority or redevelopment successor agency.
- (aaa) "Qualified Tribal Entity" means a **Federally Recognized Native American Tribe**, an eligible entity having co-ownership with a **Federally Recognized Native American Tribe**, or an eligible entity established by a **Federally Recognized Native American Tribe** to undertake Tribal housing or transportation projects.
- (bbb) "Qualifying Transit" means a transit line serving the public that is operated by the following: (1) Directly operated by a public entity; (2) Operated by a public entity via a contract for purchased transportation service with a private or non-profit provider; or (3) Operated by a private or non-profit entity as a grant Recipient or sub-recipient from a public entity. Qualifying Transit for the purpose of the Program includes various forms of fixed transit service (Rail Service and Bus Service) and Flexible Transit Service. A Qualifying Transit line requires service that departs two (2) or more times on the same route during Peak Hours as defined by the transit operator. This level of service must have occurred regularly at some point between January 2020 and the time of application. Flexible Transit service is exempt from these Peak Hours frequency requirements.
- (ccc) "Rail Service" means regularly scheduled public transit service running on rails or railways.
- (ddd) "Recipient" means the eligible applicant receiving a commitment of Program funds.
- (eee) "Regulatory Agreement" means the written agreement between the **Department** and the Sponsor that will be recorded as a lien on the **Affordable Housing Development** to control the use and maintenance of the **Project**, including restricting the rent and occupancy of the **Assisted Units**.
- (fff) "Restricted Units" mean residential units restricted by an enforceable covenant or agreement with the Department or other public agency to occupancy by low- or very low-income households, with affordable rents pursuant to **MHP** Guidelines Section 7312 or affordable housing costs pursuant to the CalHOME Program. Restricted Units must be substantially equivalent in size and number of bedrooms to the

balance of units in the Housing Development. Restricted Units may consist of units designated for any housing tenure, rental or owner-occupied, within the Housing Development.

(ggg) “Rural Area” means the definition in Health and Safety Code Section 50199.21.

(hhh) “Rural Innovation Project Area (RIPA)” means a Project Area located within a Rural Area which includes at least one (1) Transit Station/Stop with a combination of two or more eligible costs as defined in Section 103.

(iii) “Safe and Accessible Walkway” means a pedestrian corridor that has the following:

- (1) Continuously-paved, ADA-compliant sidewalks.
- (2) Marked pedestrian crossings at all arterial intersections.
- (3) Attributes which contribute to comfort and safety including, but not limited to, adequate lighting or shade canopy.

(jjj) “Secure Overnight Bicycle Parking” means bicycle parking that is not accessible to the general public, is completely enclosed and protects the bicycle from inclement weather, and allows for the bicycle frame to be secured to the bicycle rack at two points. Examples of Secure Overnight Bicycle Parking include bicycle rooms, bicycle lockers, and bicycle cages.

(kkk) “Site Control” means the applicant or Developer has control of property through one or more of the following:

- (1) 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, right of way, or irrevocable offer of dedication to a Public Agency;
- (5) An executed encroachment permit for construction of improvements or facilities within the public right of way or on public land;
- (6) An executed agreement with a public agency that gives the 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;
- (7) A land sales contract or enforceable agreement for acquisition of the property;
or

- (8) Other forms of site control that give the Department assurance (equivalent to 1-7 above) that the applicant 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.
- (III) “Smoke Free Housing” means an Affordable Housing Development that implements a policy banning the ignition and burning of tobacco products (including, but not limited to, cigarettes, cigars, pipes, and water pipes or hookahs) in all living units, indoor common areas, and all other interior spaces. The smoke-free policy must also extend to all outdoor areas within 25 feet of occupied buildings on the **AHD** property.
- (mmm) “Substantial Rehabilitation” means a Housing Development with reasonable direct rehabilitation construction contract costs of at least \$35,000 per residential unit. Rehabilitation shall include energy efficiency upgrades per residential units. Rehabilitation projects must fully and efficiently address all of the physical needs of the Project for the term of the project loan and therefore merely meeting the minimum threshold cost amount of \$35,000 per residential unit may not, in and of itself, be sufficient to be considered Substantial Rehabilitation for purposes of the project loan.
- (nnn) “Sustainable Transportation Infrastructure” means capital project(s) that result in the improvement or addition of infrastructure that encourages mode-shift from single occupancy vehicles by enhancing: 1) public transit service, 2) pedestrian networks, or 3) bicycle networks (includes public bike-share programs) as well as operations expenditures that directly support transit expansion, or a return to service levels seen prior to COVID-19 induced service cuts, within the defined Project Area meeting the transit requirements detailed in Section 102 (c) or (d).
- (ooo) “TCAC” means the California Tax Credit Allocation Committee.
- (ppp) “Transit Corridor” means a transportation corridor which meets one of the following criteria: 1) A corridor served by Qualifying Transit; or 2) A corridor served by High Quality Transit that has been the subject of analysis, planning and environmental mitigation, and has been designated for investment within the regional transportation plan of a MPO, RTPA, or within a long range transportation plan of a transit agency.
- (qqq) “Transit Signal Priority (TSP)” means an operational strategy that facilitates the movement of transit vehicles through traffic-signal controlled intersections. Objectives of TSP include meeting on time schedule performance and improved transit travel time efficiency while minimizing impacts to normal traffic operations. TSP is made up of four components: (1) a detection system that lets the TSP system where the vehicle requesting signal priority is located. The detection system communicates with a (2) priority request generator that alerts the traffic control system that the vehicle would like to receive priority. (3) Priority control strategies; and 4) System management software collecting data and generating reports.
- (rrr) “Transit Station/Stop” means a designated location at which the various Qualifying Transit service(s) drop-off and pick-up riders.

- (sss) "Transportation Demand Management" (TDM) means strategies that increase transportation system efficiency by encouraging shifting from single-occupant vehicle (SOV) trips to non-SOV transportation modes, or shifting SOV trips off peak travel periods. Effective TDM strategies result in reduction of vehicle miles traveled (VMT) by increasing travel options, providing incentives and information to incentivize individuals and employers to modify their travel behavior to support these objectives, and/or by reducing the need to travel or reducing travel distance via location efficient development patterns. TDM strategies encourage travel by transit, bike, walking or in shared vehicles.
- (ttt) "Transportation-Related Amenities" means capital improvements that are publicly accessible and provide supportive amenities to pedestrians, cyclists and transit riders (i.e. bike parking, bus shelter, benches, street trees, etc.) within the defined Project Area meeting the transit requirements detailed in Section 102 (c) or (d).
- (uuu) "Urban Forestry" means the cultivation and management of native or introduced trees and related vegetation in urban areas for their present and potential contribution to the economic, physiological, sociological, and ecological well-being of urban society.
- (vvv) "Urban forest" means those native or introduced trees and related vegetation in the urban and near-urban areas, including, but not limited to urban watersheds, soils and related habitats, street trees, park trees, residential trees, natural riparian habitats, and trees on other private and public properties.
- (www) "Urban Greening" means the incorporation of greenscaped pedestrian and bicycle trail systems, urban street canopy, green alleys, drought tolerant and native species landscaping and landscape restoration, green roofing, community gardens, natural infrastructure and stormwater features into public open spaces. If not abundantly clear, public accessibility must be demonstrated to the satisfaction of Department staff, such as through a recorded instrument, and run for at least 55 years. Public open space must offer reasonable hours of use for the public, such as dawn to dusk. Community gardens do not have to be publicly accessible as long as they are available to residents of the **Affordable Housing Development**.
- (xxx) "Urban Uses" means any residential, commercial, industrial, transit, transportation passenger facility, or retail use, or any combination of those uses. Urban uses do not include lands used for agricultural uses or parcels in excess of 15,000 square feet in size and containing only one single-family residence.
- (yyy) "Very-Low Income" has the meaning set forth in Health and Safety Code Section 50105.
- (zzz) "Water Efficiency" means controlling water at the source through design—both rainfall and storm water runoff through a decentralized system that distributes storm water across a project site in order to replenish groundwater supplies.
- (aaaa) "Zero Emission Vehicle (ZEV)" means battery electric vehicles, plug-in hybrid electric vehicles, and hydrogen fuel cell vehicles.

Appendix B. Federally Recognized Native American Tribe Eligibility

Federally Recognized Native American Tribes may qualify for AHSC funds if their **Project** meets the following requirements:

- (a) Projects are located on one of the following lands:
 - (1) Tribal Trust Lands. Real property that is held in trust by the United States Government for the benefit of a **Federally Recognized Native American Tribe**;
 - (2) Individual Trust Lands. Real property that is held in trust by the United States Government for the benefit of an individual member of a **Federally Recognized Native American Tribe**;
 - (3) Tribal Fee Restricted Lands. Fee lands that are owned by or under the control of a **Federally Recognized Native American Tribe** that are subject to a United States Government restriction that the land continue to be owned by or remain under the control of a **Federally Recognized Native American Tribe** or member or members thereof;
 - (4) Individual Fee Restricted Lands. Fee lands that were conveyed by the United States Government as individual allotments to member or members of a **Federally Recognized Native American Tribe**, regardless as to whether the property is now under common ownership among several members of that same **Federally Recognized Native American Tribe**;
 - (5) Tribally-Owned Unrestricted Lands. Fee lands that are owned by or under the control of a **Federally Recognized Native American Tribe** that are not subject to a United States Government restriction that the land continue to be owned by or remain under the control of a **Federally Recognized Native American Tribe** or member or members thereof;

AND;

- (b) The applicant meets the following requirements as a condition of award funding as set forth in a Standard Agreement, but not as a condition to engage in the competitive award process:
 - (1) BIA Consent. Applicants shall obtain Bureau of Indian Affairs consent to applicant's execution and recordation (as applicable) of all Department-required documents that are subject to 25 CFR sec. 152.34 or 25 CFR sec. 162.12, all prior to award disbursement. This requirement shall not apply to projects that are within subdivision (i)(5) of this Section.
 - (2) Personal Jurisdiction for Tribal Applicants. For applicants that are **Federally Recognized Native American Tribes** or Tribal controlled entities, all such applicants shall provide and execute a limited waiver of sovereign immunity agreeing to the personal jurisdictions of state court.

- (3) Subject Matter Jurisdiction for Restricted Tribal Lands. For applicants proposing projects that are to be within property described in sub-divisions (i)(1), (i)(2), (i)(3), and (i)(4), all such applicants shall cause the subject Native American Tribe to provide and execute a limited waiver of sovereign immunity satisfactory to the Department, agreeing to the subject matter jurisdiction of state court.
- (4) Title Insurance Requirements. Applicants shall provide title insurance for the property underlying the **Project** satisfactory to the Department. Notwithstanding the foregoing sentence, upon a showing of good cause, for Applicants unable to provide a conventional title insurance policy satisfactory to the Department, all such Applicants shall demonstrate to the satisfaction of the Department that they hold title to the property pursuant to a title condition report issued by the BIA Land Title and Records Office, and pursuant to a title opinion letter issued for the benefit of the Department but paid for by the Applicant.
- (5) Recordation Requirements. Where recordation of instruments are required by the Department, the subject instrument shall be deemed sufficiently recorded if recorded with the Land Titles and Records Office at the BIA or if the subject instruments are recorded in the County recording system having jurisdiction over the property.
- (6) Fee Security Required. For all Projects, except those falling within subdivision (i)(1) and (ii)(2), fee security shall be required, unless the terms allowing leasehold security are satisfied as set forth in Title 25 CCR 8316. If a Department loan/grant is recorded on fee land then there must be a restriction preventing that land being put into trust until the Department loan/grant term is complete.
- (7) Minimum Requirements for Sovereign Immunity Waivers. Sovereign immunity waiver language shall be included in the Department Standard Agreement, and all Department regulatory and loan or grant agreements, all of which may be accomplished by incorporating by reference a separately executed sovereign immunity waiver instrument. The Applicant shall also provide or obtain a separate limited waiver of sovereign immunity instruments for both personal and subject matter jurisdictions which shall require, at a minimum, compliance with State construction standards and regulations.

Appendix C. Awardee Publicity Guidelines

AHSC award **Recipients** are required to acknowledge SGC, HCD, and California Climate Investments (CCI) in all publications, websites, signage, invitations, and other media-related and public-outreach products related to the AHSC Project. Guidance on CCI logo usage, signage, and logo files contained in the Style Guide are available at: www.caclimateinvestments.ca.gov/logo-graphics-request. SGC and HCD staff will provide their respective logo files and guidance on their usage directly to **Recipients**.

- (a) Long-form written materials, such as reports, must include the following standard language about SGC, HCD, AHSC, and CCI:
 - (1) “The Affordable Housing and Sustainable Communities (AHSC) Program builds healthier communities and protects the environment by increasing the supply of affordable places to live near jobs, stores, transit, and other daily needs. This program is administered by Strategic Growth Council (SGC), which coordinates the activities of State agencies and partners with stakeholders to promote sustainability, economic prosperity, and quality of life for all Californians (www.sgc.ca.gov) and implemented by the Department of Housing and Community Development (HCD).

The AHSC Program is part of CCI, a statewide program that puts billions of Cap-and-Trade dollars to work reducing GHG emissions, strengthening the economy, and improving public health and the environment – particularly in disadvantaged communities. The Cap-and-Trade program also creates a financial incentive for industries to invest in clean technologies and develop innovative ways to reduce pollution. California Climate Investments projects include affordable housing, renewable energy, public transportation, zero-emission vehicles, environmental restoration, more sustainable agriculture, recycling, and much more. At least 35 percent of these investments are located within and benefiting residents of disadvantaged communities, low-income communities, and low-income households across California. www.caclimateinvestments.ca.gov.”

- (b) Any informational materials that do not qualify as long-form, but that include at least a paragraph of text, such as press releases, media advisories, short case studies, some flyers, etc., should include the following language:
 - (1) Long version: “[Project Name] is supported by California Strategic Growth Council’s Affordable Housing and Sustainable Communities program with funds from [California Climate Investments](http://www.caclimateinvestments.ca.gov), a statewide initiative that puts billions of Cap-and-Trade dollars to work reducing greenhouse gas emissions, strengthening the economy, and improving public health and the environment – particularly in disadvantaged communities.”
 - (2) Short version: “[Project Name] is supported by California Strategic Growth Council’s Affordable Housing and Sustainable Communities program with funds from [California Climate Investments](http://www.caclimateinvestments.ca.gov)—Cap-and-Trade Dollars at Work.”

- (c) **Recipients** may at times produce promotional materials that are primarily visual in nature, such as banners, signage, certain flyers, and sharable images for social media. In such cases, when including the boilerplate language acknowledging CCI and SGC support is not practical, grantees should instead include the official logos of both SGC and CCI, preceded by the words “Funded by.”
- (d) AHSC award **Recipients** are required to identify a point of contact for all press inquiries and communications needs related to the project and provide the name, phone number and email address of this individual to SGC. **Recipients** must also distribute a press release after grant decisions are made at SGC’s Public Council Meeting and are encouraged to do so for other major milestones throughout the lifecycle of the grant. All press releases must be approved by SGC Communications Office prior to distribution and SGC must be alerted and invited to participate in any and all press conferences related to the award.
- (e) AHSC **Recipients** are required to prepare one or more two-to-four-page documents that provide a summary of the Project components and tell the story of the AHSC proposal development process and/or implementation. All such materials must be approved by SGC Communications Office prior to distribution. These materials will be displayed on SGC website.
- (f) AHSC Applicants and **Recipients** are encouraged to use social media to share the process of creating an AHSC proposal and to inform the throughout implementation. @CalSGC, @California_HCD, and @CAClimateInvest should be tagged on all posts related to the AHSC grant. Use of the hashtags #AHSC, #AffordableHousing, and #SustainableCommunities is encouraged.

AHSC IMPLEMENTATION AND MUTUAL INDEMNITY AGREEMENT

THIS AHSC IMPLEMENTATION AND MUTUAL INDEMNITY AGREEMENT (the “Agreement”) is made and entered into as of June 8, 2021 between the San Francisco Bay Area Rapid Transit District, a rapid transit district pursuant to Public Utilities Code Section 28500 et seq., (“District”), and BRIDGE Housing Corporation, a California nonprofit public benefit corporation (“Developer,” and collectively with the District, the “Parties,” or individually, a “Party”) upon the basis of the following facts, understanding and intentions of the parties:

A. The State of California, the Strategic Growth Council (“SGC”) and the Department of Housing and Community Development (“HCD”) issued a Notice of Funding Availability dated February 26, 2021 (the “AHSC NOFA”), under the Affordable Housing and Sustainable Communities (“AHSC”) Program established under Division 44, Part 1 of the Public Resources Code, commencing with Section 75200.

B. Developer and City and County of San Francisco, as co-applicants, are applying for AHSC Funds in response to the AHSC NOFA to provide funding for (A) construction of the Balboa Reservoir Building E affordable housing project in San Francisco, CA (the “Housing Project”); (B) the provision of certain sustainable transportation infrastructure by the District (the “BART STI Improvements”); (C) the construction of certain transportation-related amenities by the District (the “BART TRA Improvements”); (D) the construction of certain transportation-related improvements to be constructed by other parties (“Non-BART Transportation Projects”), and (E) certain costs related to purchase of SF MUNI “A” transit passes for residents and other programs (the “AHSC Programs”). These improvements are described in more detail in the final application to be submitted by June 8, 2021 (collectively, the “AHSC Application”).

C. The AHSC Application seeks an award to the Developer in an aggregate amount of up to \$30,000,000 in AHSC Funds consisting of: (A) \$19,610,404 of AHSC loan Funds for a permanent loan (“AHSC Loan”) which will be disbursed to a to-be-formed limited partnership (the “Partnership”), for construction of the Housing Project; (B) \$5,034,634 of the AHSC grant funds for the purpose of reimbursing the cost of the BART STI Improvements; (C) \$1,300,000 of AHSC grant funds for the purpose of reimbursing the cost of the BART TRA Improvements; (D) \$3,386,707 of AHSC grant funds for the purpose of reimbursing the cost of the Non-BART Transportation Projects; and (E) \$253,480 of AHSC grant funds for reimbursing the costs of the AHSC Programs. The AHSC grants shall be referred to collectively as the “AHSC Grants.” The AHSC Loan and the AHSC Grants are collectively referred to herein as the “AHSC Financing.”

D. The District and Developer are required to enter into this Agreement in order to comply with the specific AHSC Program Threshold Requirement stated in Section 106(a)(12) of the 2021 AHSC Program Guidelines dated February 24, 2021 (the “Transportation Agency Prior Experience Threshold Requirement”). This section of the guidelines dictates that applicants must demonstrate prior experience by providing evidence of at least two prior projects that are similar to the proposed AHSC project in scope and size, which have been completed by the applicant, or joint applicant, during the ten (10) years preceding the application due date. This section of the guidelines also states that the applicants may demonstrate the requisite experience by using the past experience of work completed of a non-applicant so long as the applicants can provide an executed agreement with that specific non-applicant for the completion of the related work in the

AHSC Application for which funding is sought. The purpose of this Agreement is to, amongst other things, comply with the Transportation Agency Prior Experience Threshold Requirement.

E. The District is a non-applicant, but, as set forth herein, will have obligations to perform the following specific BART STI Improvements and BART TRA Improvements, included in the AHSC Application (collectively, the “Transit Obligations”):

1. BART STI Improvements: Purchase of two new capacity-increasing heavy rail cars to extend the length of trains, increase the number of trains operating through the Transbay Tube during peak, and maximize throughput capacity across the BART network. .
2. BART TRA Improvements: BART will install 20 Next Generation Fare Gates at Balboa Park BART Station as part of an effort to upgrade all fare gates throughout its system. The Next Generation Fare Gate design incorporates a tall, swing-style gate with improved passenger throughput and maintainability, and a more modern appearance.

F. The District owns the property on which the TRA Improvements will be constructed, and thus has sufficient “site control” as that term is defined in the AHSC Program Guidelines.

G. The District can demonstrate prior experience and provide evidence of at least two prior projects that are similar in scope and size which have been completed during the ten (10) years preceding June 8, 2021. Below is a list of these projects:

1. STI: Rail Car Procurement Program: On May 10, 2012, the Board of Directors authorized the award of a contract to Bombardier Transit Corporation for the procurement of new rail cars. BART has replaced 296 of its rail cars as of March 2021 as part of an overall program to not only replace but expand its fleet.
2. TRA: Concord BART Station Plaza Improvements: An upgrade of the exterior public spaces surrounding the Concord BART station entrance for a more context-sensitive design that improves the safety and livability of the station area. The project improved multimodal transfer waiting areas and enhanced pedestrian and bicycle connections to surrounding neighborhoods. Areas improved included the existing plaza and pedestrian paseo to the west of the station, bus transfer area, station entrance and ticket vending area, and pedestrian connections east of the station. Completion date: July 27, 2018.

H. Subject to receipt of an award of the AHSC Financing, the District shall be responsible for completing the Transit Obligations, and for all costs and expenses related thereto, and Developer shall be responsible for constructing and developing the Housing Project and for providing the AHSC Programs, subject to the closing of all financing necessary for such construction and development (together, the “Developer Obligations”), and for all costs and expenses related thereto. In connection with the AHSC Grants and AHSC Loan, Developer is required to enter into standard agreements, reimbursement agreements, and regulatory

agreements with HCD where Developer will be liable for the full and timely performance by the parties to complete the obligations set forth therein, including completion of the Developer Obligations, Transit Obligations, and Non-BART Transportation Projects, as described in the AHSC Application. The AHSC Application and all standard agreements, reimbursement agreements, regulatory agreements and any other agreements required by HCD in connection with the AHSC Financing and executed by Developer shall be collectively referred to herein as the “AHSC Documents.”

I. The District and Developer each acknowledge and agree that the inability or failure by either party to fully and timely complete each party’s respective improvements required by the AHSC Documents may affect the timing and right of the other party to receive reimbursement of AHSC funds due the other party notwithstanding the other party’s full and timely performance of its obligations.

NOW, THEREFORE, in consideration of the recitals, covenants and agreements set forth herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereto hereby agree as follows:

AGREEMENT

1. Obligations. The District shall, in its sole responsibility, complete the Transit Obligations in accordance with the terms of the AHSC Documents and the approved design and construction documents and in accordance with the terms of this Agreement. The Developer shall, in its sole responsibility, complete the Developer Obligations in accordance with the terms of the AHSC Documents and the approved design and construction documents. Each Party will provide the other Party with copies of all requisitions for work related to their respective work, the notice of completion, and other documents related to their respective work that another party may reasonably request.

2. District Indemnity. District is responsible for carrying out the Transit Obligations using AHSC grant proceeds in accordance with the AHSC Documents, including, but not limited to, any disbursement deadlines contained therein. District shall indemnify, defend, and hold harmless Developer, and its affiliates, directors, officers, partners, members, agents and employees (each, an “Developer Indemnified Party”) against any and all claims, actions, suits, causes of action, losses, liabilities, injuries, costs, damages, or expenses (collectively, “Claims”), including, without limitation, any loss, liability, damage, or expense, court costs and attorneys’ fees, arising out of or in connection with the District’s performance of or failure to perform its obligations to complete the Transit Obligations or otherwise comply with the District’s obligations under the AHSC Documents in the manner and within the time periods set forth in the AHSC documents. However, in no event shall the Developer Indemnified Party be indemnified hereunder for any Claims to the extent said Claims result from such party’s gross negligence or willful misconduct. District agrees to pay all of the Developer Indemnified Party’s costs and expenses, including reasonable attorneys’ fees, which may be incurred in any effort to enforce any term of this Agreement, including, but not limited to, all such costs and expenses which may be incurred by any Developer Indemnified Party in any legal action, reference or arbitration proceeding brought by HCD or other third party.

3. Developer Indemnity. Developer is responsible for carrying out the Developer Obligations using AHSC grant proceeds and AHSC Loan funds in accordance with the AHSC Documents, including, but not limited to, any disbursement deadlines contained. Developer shall indemnify, defend, protect, and hold harmless the District and its affiliates, directors, officers, partners, members, agents and employees (each, an “District Indemnified Party”) against any and all Claims, including, without limitation, any loss, liability, damage or expense, court costs and attorneys’ fees, arising out of or in connection with Developer’s performance of or failure to perform its Developer Obligations to complete construction and development of the Housing Development, in the manner and within the time periods, and to otherwise perform any covenants, set forth in the AHSC Documents. However, in no event shall the District Indemnified Party be indemnified hereunder for any Claims to the extent said Claims result from party’s gross negligence or willful misconduct. Developer agrees to pay all of the costs and expenses of the District Indemnified Party, including reasonable attorneys’ fees, which may be incurred in any effort to enforce any term of this Agreement, including, but not limited to, all such costs and expenses which may be incurred by any District Indemnified Party in any legal action, reference or arbitration proceeding brought by HCD or other third party.

4. Schedule of Performance; Progress Reports. Developer and District shall comply with the schedule of performance set forth in Exhibit A attached hereto for the completion of their respective obligations hereunder (the “Schedule of Performance”). The District and Developer agree to give the other Party a written quarterly status report on the progress toward the milestones listed in Exhibit A, i.e., the Developer will report on the Developer’s progress on the Housing Project and HRI Improvements and the District will report on the District’s progress on the BART STI Improvements and BART TRA Improvements. If any Party anticipates not meeting the targeted construction and grant disbursement milestones as established in the AHSC Documents, that Party will promptly notify the other Party in writing and will meet with the other Party to discuss the reasons why the milestone dates may not be met and what actions the delayed Party intends to take to meet the milestones or otherwise rectify the work schedule in order to maintain good standing with the terms and conditions established in the AHSC Documents.

5. Delegation. Notwithstanding the obligations of each Party under this Agreement, each Party shall be entitled to enter into sub-agreements with each other or with other parties to provide any assistance or services needed for each Party to perform its obligations under this Agreement and the AHSC Documents.

6. Disbursement of AHSC Grant Funds. Developer and District agree that the costs of the Developer Obligations shall be reimbursed to Developer from the AHSC Financing. Developer and District also agree that the costs for the Transit Obligations shall be reimbursed to the District from the AHSC Grants, up to the amounts set forth in Recital C of this Agreement.

7. Cost Overruns. Developer shall be responsible for paying all costs required to complete the Developer Obligations, irrespective of whether such costs exceed the AHSC Loan. District shall be responsible for paying all costs required for the Transit Obligations, irrespective of whether such costs exceed the portion of the AHSC Grant designated for the Transit Obligations and set forth in Recital C.

8. Billing and Payment Procedure: The District shall submit to Developer all reimbursement requests in the form of monthly invoices for the costs associated with the Transit Obligations. Invoices will include backup documentation as required by HCD. Developer shall submit corresponding reimbursement requests to HCD within 15 days of receipt of District's invoice (or such later date as may be required by HCD, but in any event within 45 days after receipt of the District's invoice) and disburse to the District any such funds received from HCD within 7 days of receipt. Failure of the Developer to timely submit the District reimbursement requests to HCD or to immediately disburse any funds received from HCD for the Transit Obligations to the District shall be a default under this Agreement and shall excuse the District from performance of the applicable portion of the Transit Obligations. In no event will the District's invoices submitted to the Developer exceed \$6,334,634.

9. Implementation Agreements. In the event a grant award is received from AHSC, District and the Developer recognize that each Party may need additional assurances from the other Party (including assurances for the Housing Project's lenders and investors) regarding the AHSC Grant and AHSC Loan before commencement of construction of the Housing Project and the Transit Obligations. The Parties agree to cooperate with each other to reach mutual agreement on amendments to this Agreement, other implementation agreements or estoppel certificates necessary to provide reasonable assurances and indemnifications related to the disbursement of AHSC Grant funds. The Parties recognize that any such amendments to this Agreement or execution of additional agreements may require approval of the District's Board of Directors and the Developer's Board of Directors.

10. Notices. Formal notices, demands, and communications between the parties shall be sufficiently given if, and shall not be deemed given unless, dispatched by registered or certified mail, postage prepaid, return receipt requested, or delivered by express delivery service, return receipt requested, or delivered personally, to the principal office of the Parties as follows:

District: Sean Brooks
Director, Real Estate & Property Development
BART
2150 Webster St., 9th floor
Oakland, CA 94612
510-464-6114
sbrook1@bart.gov

Developer: Brad Wiblin
BRIDGE Housing Corporation
600 California Street, Suite 900
San Francisco, CA 94108
415-989-1111

11. Events of Default. The occurrence of any of the following events shall constitute an Event of Default under this Agreement:

(a) A Party fails to perform any of its obligations under this Agreement, and does not cure, or take reasonable action to begin to cure, such failure within 30 days after written notice of such failure has been delivered to the defaulting Party in accordance with Section 10 above; or

(b) A Party purports to revoke this Agreement or this Agreement becomes ineffective for any reason.

12. Termination. This Agreement shall terminate upon the earlier of: (i) completion of all obligations under the AHSC Documents; or (ii) mutual agreement of the Parties hereto.

13. Third Party Beneficiary. The Partnership shall be a third party beneficiary of this Agreement and shall be entitled to the rights and benefits hereunder and may enforce the provisions hereof as if it were a party to this Agreement.

14. Assignment. District hereby acknowledges and approves the assignment by Developer of its obligations hereunder to the Partnership, in which event Developer shall be released of all obligations hereunder, and assignment by the Developer and the Partnership to the Housing Project's senior lender ("Construction Lender") of all of their respective right, title and interest in, to and under the Agreement (the "Collateral") as collateral security for the Partnership's obligations to Construction Lender under, and in connection with Construction Lender's loan to the Partnership. In the event Construction Lender forecloses upon the Collateral, District hereby agrees that Construction Lender shall have all of Developer's rights and interests under the Agreement. Construction Lender is hereby made an express third party beneficiary of this Section 14, and the parties hereto shall not amend, modify or terminate the Agreement without Construction Lender's express written consent.

15. Miscellaneous.

(a) Nothing in this Agreement shall be construed to limit any claim or right which any Party may otherwise have at any time against an Indemnitor or any other person arising from any source other than this Agreement, including any claim for fraud, misrepresentation, waste, or breach of contract other than this Agreement, and any rights of contribution or indemnity under any federal or state environmental law or any other applicable law, regulation, or ordinance.

(b) If any Party delays in exercising or fails to exercise any right or remedy against a Party, that alone shall not be construed as a waiver of such right or remedy. All remedies of any Party against the other Party are cumulative.

(c) This Agreement shall be binding upon and inure to the benefit of each of the Parties hereto and their respective representatives, heirs, executor, administrators, successors, and assigns. This Agreement may not be amended except by a written instrument executed by the Parties hereto.

(d) This Agreement shall be deemed to have been delivered and accepted in the State of California and governed exclusively by the internal substantive laws of the State of California as the same may exist at the date hereof. The Parties hereto agree that any action hereon between the parties and their successors in interest may be maintained in a court of competent jurisdiction located in the State of California, and consent to the jurisdiction of any such California court for the purposes connected herewith.

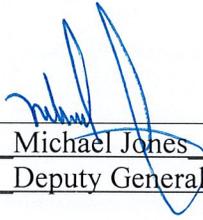
(e) Each Party hereto intends that this Agreement shall not benefit or create any right or cause of action in or on behalf of any person other than the Parties hereto.

(f) This Agreement may be executed in multiple counterpart copies, any one of which when duly executed, with all formalities hereof, shall be fully binding and effective as the original of this Agreement.

(g) This Agreement shall be effective as of the date first written above, provided however that in the event that the parties do not receive an award of the AHSC Funds, this Agreement shall automatically terminate and be of no further force or effect.

[Signatures on following page]

District:

By: 
Name: Michael Jones
Its: Deputy General Manager

Developer:

BRIDGE Housing Corporation

By: 
Name: Brad Wiblin
Its: Executive Vice President

EXHIBIT A

Schedule of Performance

(Subject to receipt of AHSC Round 6 Award Consistent with June 8, 2021 Application)

BART:

BART STI Improvements

Performance Milestone	Date
Begin procurement	December 8, 2021
Complete delivery of transit vehicles	June 30, 2023
All funds fully disbursed	November 30, 2027

BART TRA Improvements:

Performance Milestone	Date
Begin construction	July 1, 2024
Complete construction	December 31, 2026
All funds fully disbursed	December 31, 2026

Developer:

Performance Milestone	Date
Execute Standard Agreement for AHSC Grants	October 1, 2022
Execute Disbursement Agreement for AHSC Grants	October 1, 2022
Begin construction of housing project	October 1, 2022
Complete construction and obtain Certificate of Occupancy	October 1, 2024
All funds fully disbursed	March 1, 2026

**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



February 26, 2021

MEMORANDUM FOR: ALL POTENTIAL APPLICANTS

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

SUBJECT: **Affordable Housing and Sustainable Communities Program
Notice of Funding Availability**

The California Strategic Growth Council (SGC) and the California Department of Housing and Community Development (Department) are pleased to announce the release of this Notice of Funding Availability (NOFA) with approximately \$405 million in funds for the Affordable Housing and Sustainable Communities (AHSC) program. This funding provides loans and grants to developers, non-profits, cities, counties, transit agencies, and Native American Tribes. The AHSC program furthers the purposes of [AB 32](#) (Chapter 488, Statutes of 2006), [SB 375](#) (Chapter 728, Statutes of 2008), and [SB 32](#) (Chapter 249, Statutes of 2016) in that the purpose of the AHSC program is to reduce greenhouse gas (GHG) emissions through projects implementing land-use, housing, transportation, and agricultural land preservation practices to support infill and compact development, while supporting related and coordinated public policy objectives. Funding for the AHSC program is provided from the Greenhouse Gas Reduction Fund (GGRF), an account established to receive Cap-and-Trade auction proceeds.

The AHSC program is part of California Climate Investments (CCI), a statewide program funded through the GGRF that puts billions of Cap-and-Trade dollars to work reducing GHG emissions, strengthening the economy, and improving public health and the environment – particularly in disadvantaged communities.

Application materials must be submitted electronically via the Financial Assistance Application Submittal Tool (FAAST) system no later than 5:00 p.m. Pacific Daylight Time on Tuesday, June 8, 2021. The Department will no longer accept hardcopy submittals.

AHSC program application forms, webinar details, and related program information is available at <http://sgc.ca.gov/programs/ahsc/> and <http://www.hcd.ca.gov/grants-funding/active-funding/ahsc.shtml>. To receive information on workshops and other updates, please [subscribe](#) to the Department's listserv for the AHSC program. If you have questions, please contact the SGC's AHSC team at ahsc@sgc.ca.gov.

Attachment

**AFFORDABLE HOUSING AND
SUSTAINABLE COMMUNITIES PROGRAM
Notice of Funding Availability
Round 6**



**CALIFORNIA STRATEGIC
GROWTH COUNCIL**



**Gavin Newsom, Governor
State of California**

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

**Louise Bedsworth, PhD, Executive Director
California Strategic Growth Council**

**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: <http://www.hcd.ca.gov/grants-funding/active-funding/ahsc.shtml>
AHSC Program Email: ahsc@hcd.ca.gov

February 26, 2021

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I. Overview

A. Notice of Funding Availability

The Strategic Growth Council (SGC) and the California Department of Housing and Community Development (Department) hereby announce the availability of approximately \$405 million in funding for the Affordable Housing and Sustainable Communities (AHSC) program. The AHSC program is administered by SGC and implemented by the Department. The California Air Resources Board (CARB) provides the quantification methodology for determining the greenhouse gas (GHG) emissions reductions for the AHSC program.

These AHSC program funds will be used for loans or grants, or a combination thereof, to projects that will achieve GHG emissions reductions to benefit all California communities, particularly through increasing accessibility to affordable housing, and key destinations via low-carbon transportation resulting in fewer vehicle miles traveled through shortened or reduced trip length or mode shift from single occupancy vehicle use to transit, bicycling, or walking.

B. Timeline

NOFA Release	February 26, 2021
Application Due Date	June 8, 2021
Award Announcement	October 28, 2021

C. Authorizing Legislation and Regulations (Regulatory Authority)

The AHSC program furthers the purposes of [AB 32](#) (Chapter 488, Statutes of 2006), [SB 375](#) (Chapter 728, Statutes of 2008), and [SB 32](#) (Chapter 249, Statutes of 2016). Available funds are subject to the AHSC program Guidelines approved by the SGC February 24, 2021, or as amended (Guidelines). The Guidelines include detailed information on eligibility requirements, application selection criteria, established terms, conditions, and procedures for funds awarded under AHSC. The Guidelines are available at <http://www.sgc.ca.gov/programs/ahsc/resources/>.

Applicants are responsible for complying with the AHSC program requirements set forth in the Guidelines, this NOFA, and the application materials. Applicants are encouraged to carefully review the Guidelines and information contained in this NOFA before submitting applications.

II. Program requirements

The following is provided as a summary and is not to be considered a complete representation of the entirety of the eligibility, threshold, or other requirements or terms and conditions of the AHSC program. Please note that capitalized words may be defined terms and can be found in the program Guidelines. Please refer to the Guidelines for complete information.

A. Eligible Applicants

Applicants must be eligible pursuant to Guidelines Section 105, Eligible Applicants.

Please note: A special purpose entity, which is formed and controlled by the Developer, and which will serve as the ultimate borrower of AHSC loan funds, is not an Eligible Applicant, but may be named in the portion of the application that requests the name of the ultimate borrower.

B. Eligible Projects

Eligible projects must fall into one of the following three eligible Project Area types:

- Transit Oriented Development (TOD) Project Area type
- Integrated Connectivity (ICP) Project Area type
- Rural Innovation Project Area (RIPA) type

For a detailed list of all eligible costs, please refer to Guidelines Section 103, Eligible costs.

C. Program funding amounts and terms

- 1. AHSC program funding award maximum:** The maximum AHSC program loan or grant award, or combination thereof, is \$30 million with a minimum award of \$1 million.
- 2. AHSC program funding developer maximum:** A single Developer may receive no more than \$60 million per NOFA funding cycle. This limitation may be waived by SGC if necessary, to meet statutory requirements referenced in Guidelines Section 108.
- 3. Terms of assistance:** Assistance terms and limits are set forth in Guidelines Section 104, Assistance terms and limits. Loans for rental Affordable Housing Developments are subject to requirements set forth in Guidelines Section 104(b). Grants are subject to the terms and requirements set forth in Guidelines Section 104(c).

D. Threshold

In addition to meeting the requirements of the Guidelines as described in paragraphs A, B, and C above, Applicants and projects are also required to meet the program threshold requirements found in Section 106 of the Guidelines.

E. Rating and ranking

Applications will be scored according to Guidelines Section 107, Scoring Criteria. AHSC program funds will be allocated through a competitive process, based on the merits of the application, as detailed in Section 108.

III. Application submission and review procedures

Applications must meet eligibility requirements upon submission. Modification of the application forms by the Applicant is prohibited. It is the Applicant's responsibility to ensure the application is clear, complete, and accurate. After the application deadline, Department staff may request clarifying information, provided such information does not affect the competitive rating of the application. No information, whether written or oral, will be solicited or accepted if this information would result in a competitive advantage to an Applicant or a disadvantage to other Applicants. No Applicant may appeal the evaluation of another Applicant's application.

The AHSC program application forms, workshop details, and related program information will be available at <http://sgc.ca.gov/programs/ahsc/resources/> or <http://www.hcd.ca.gov/grants-funding/active-funding/ahsc.shtml>. To receive information on workshops and other updates, please subscribe to the Department's listserv for the AHSC program. Application materials will be posted at <http://www.hcd.ca.gov/grants-funding/active-funding/ahsc.shtml> prior to NOFA workshops. Questions may be directed to the AHSC program at ahsc@hcd.ca.gov or ahsc@sgc.ca.gov

A. Financial Assistance Application Submittal Tool (FAAST) Application Components

Complete applications must include the following components:

1. AHSC Application Workbook

All applicants must complete and submit the AHSC Application Workbook.

2. AHSC Benefits Calculator Tool

All applicants must complete and submit the AHSC Benefits Calculator Tool to meet requirements referenced in Guidelines Section 106 and Estimated GHG Emissions Reductions Scoring in Section 107.

3. Electronic FFAST submission

Application materials will be submitted electronically via the FFAST system. Requirements for uploading the AHSC Application Workbook and required supporting documentation and identified naming conventions are described in the application instructions available at <http://www.hcd.ca.gov/grants-funding/nofas.shtml>. Applicants must upload all application materials to the [FFAST](#) system.

B. Electronic document submittal

Application materials must be submitted electronically via the FFAST system no later than 5:00 p.m. Pacific Daylight Time on **June 8, 2021**. The Department will no longer accept hardcopy submittals.

Personal deliveries will not be accepted. No facsimiles, incomplete applications, application revisions, or walk-in application packages will be accepted.

C. Application review

1. Phase One

Application completeness and satisfaction of threshold criteria described in the Guidelines will be confirmed. Please note, the threshold review for financial feasibility criteria in this phase consists of only verification of documentation completeness, not an evaluation of the material facts. The complete financial feasibility review will take place in Phase Three. Phase One is a pass/fail stage and Applicants will receive notification of their status upon completion of threshold reviews with a five-day opportunity to appeal the findings of the reviews.

2. Phase Two

Quantitative policy criteria and AHSC Greenhouse Gas Quantification Methodology (GHG QM) will be evaluated for proposals that have met the requirements of Phase One. An initial score letter will be provided to applicants with a five-day opportunity to appeal the findings of the reviews. AHSC staff will review appeal responses and revise scores where appropriate. Applicants who score less than 50 percent of the total Quantitative Policy criteria and GHG QM points will not be eligible to move forward. The final score letter will include notification of application status.

3. Phase Three

An interagency team will review the narrative section of applications, which have scored 50 percent or higher in Phase Two. During Phase Three, an in-depth evaluation of the project's financial feasibility will be performed.

D. Application Workshops

AHSC program staff will conduct application webinars and pre-application virtual consultations for the Round 6 application submissions. AHSC webinar details and related program information will be posted on the SGC [website](#). Appointments are required for pre-application consultations. Appointment requests and questions should be directed to ahsc@sgc.ca.gov.

E. 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 (Chapter 1473, Statutes of 1968). As such, any materials provided will be disclosable to any person making a request under this Act. The Department 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 the Department, 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 the Department's notice that an application has been determined to be incomplete, ineligible, fail threshold review, or have a reduction to the initial point score, Applicants under this NOFA may appeal such decision(s) to the Department pursuant to this section.
2. No Applicant shall have the right to appeal a decision of the Department 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 decision of the Department 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. Process: To file an appeal, Applicants must submit to the Department, by the deadline set forth below, a written appeal, 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 the Department, no further information of materials will be accepted or considered thereafter. Appeals are to be

submitted to the Department at ahsc@hcd.ca.gov according to the deadline set forth in Department review letters.

2. Filing deadline: Appeals must be received by the Department no later than five business days from the date of the Department's threshold review letters, or initial score letters, representing the Department's decision made in response to the application.

C. Decision

Any request to appeal the Department's decision regarding an application shall be reviewed for compliance with the AHSC Guidelines <https://sgc.ca.gov/programs/ahsc/resources/guidelines.html> and this NOFA. All decisions rendered shall be final, binding, and conclusive, and shall constitute the final action of the Department.

V. Award Announcements and Contracts

A. Award Announcements

Award recommendations will be posted with SGC Meeting materials at <http://www.sgc.ca.gov/meetings> ten days prior to the SGC public meeting.

B. Contracts

Successful Applicants (awardee(s)) will enter into one or more Standard Agreements with the Department. The Standard Agreement contains all the relevant state and federal requirements, as well as specific information about the award and the work to be performed. The Standard Agreements will expressly cross-default all components of the award to one another.

VI. Other State Requirements

A. Article XXXIV

All projects shall comply with Article XXXIV, Section 1 of the California Constitution, as clarified by the Public Housing Election Implementation Law (HSC Section 37000 - 37002). Article XXXIV documentation for loans underwritten by the Department shall be subject to review and approval by the Department prior to the announcement of award recommendations.

Article XXXIV requires local voter approval before any state public body can develop, construct, or acquire a low-rent housing project in any manner. However, the Public Housing Election Implementation Law (HSC Section 37000 – 37002) provides clarification as to when Article XXXIV is applicable. Health & Safety Code (HSC) Section 37001, for example, lists a number of project types that are not considered “low-rent housing projects.”

Applicants must submit documentation that shows the project's compliance with or exemption from Article XXXIV. If a project is subject to Article XXXIV, the Department requires an allocation letter from the locality that shows that there is Article XXXIV authority for the project. A local government official with authority should prepare the allocation letter, and it should include the following:

1. The name and date of the proposition and the number of units that were approved;
2. A copy of the referendum and a certified vote tally;
3. The number of units that remain in the locality's "bank" of Article XXXIV authority (i.e., the number of units that are still available for allocation); and
4. The number of units that the locality will commit to this project, including the manager unit.

If a project is statutorily exempt from Article XXXIV, the Department requires an Article XXXIV opinion letter from the Applicant's legal counsel. The Article XXXIV opinion letter must demonstrate that the Applicant has considered both the legal requirements of Article XXXIV and the relevant facts of the project (e.g., all funding provided by public bodies, including state, county, or city sources, the number of low-income restricted units, and the general content of any regulatory restrictions). Any conclusion that a project is exempt from Article XXXIV must be supported by facts and a specific legal theory for exemption that itself is supported by the Constitution, statute, and/or case law.

B. Relocation

The Applicant must comply with Government Code Section 7260 et seq., the California Code of Regulations, title 25, Section 6000 et seq., and, if applicable, 49 CFR Part 24 of the Uniform Relocation Assistance and Real Property Acquisition for Federal and Federally Assisted Programs (URA) (collectively referred to herein as Relocation or Relocation Law).

Failure to comply with applicable Relocation requirements will result in rejection of the application and disencumbrance of any awards made to the Project.

C. Pet Friendly Housing Act of 2017

Housing funded through the AHSC program is subject to the Pet Friendly Housing Act of 2017 (HSC §50466). Each Awardee is required to submit a signed and dated certification that residents of the AHSC funded housing development will be authorized to own or otherwise maintain one or more common household pets.

D. 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 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.

VII. Other Terms and Conditions

A. Right to Modify or Suspend

The Department 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, the Department will notify all interested parties [via listserv](#) and will post the revisions to the AHSC website. Please be sure and subscribe at the listserv link.

B. Operating Subsidies

Must be committed, as evidenced by letters of intent, commitment letters, grant awards or subsidy contracts, or, if commitments are not available, other documentation such as a reservation or third-party letter stating the following: total subsidy and estimated first year allocation, date or expected date of award, and term (in years).

C. Project-based Rental Assistance

Project-based rental assistance does not need to be committed at time of application, but a fully executed contract will be required prior to loan closing. Projects having or proposing project-based rental assistance must provide documentation of current contract rents. Projects having or proposing project-based rental assistance shall fund a Transition Reserve in accordance with MHP Guidelines Section 7312(f)(2).

D. 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.

**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 95833
(916) 263-2771
www.hcd.ca.gov



October 14, 2021

MEMORANDUM FOR: ALL POTENTIAL APPLICANTS

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

Handwritten signature of Jennifer Seeger in blue ink.

SUBJECT: **Affordable Housing and Sustainable Communities Program
Amended Notice of Funding Availability – Round 6**

On February 26, 2021, the California Department of Housing and Community Development (HCD) announced the availability of approximately \$405 million in funds for the Affordable Housing and Sustainable Communities (AHSC) program. Then on July 27, 2021, California Strategic Growth Council (Council) staff recommended an increase of \$380 million in revenues from recent Greenhouse Gas Reduction Fund (GGRF) auctions to augment the current Notice of Funding Availability (NOFA). The Council approved the funding augmentation at their September 8, 2021 Council Meeting, which increased the total funding amount available in the AHSC NOFA to approximately \$785 million.

In addition, the Council approved an increase to the Developer maximum loan limit per funding cycle. The amended Developer maximum for this funding round shall be \$120 million pursuant to NOFA section II(C)(2), page 2. Amended NOFA language is shown in red text in the attached NOFA pages. Please see below for a summary of all updates:

- Program funding has been increased to \$785 million. Changes to the dollar amount can be found on page 1 of the NOFA; and
- Developer maximum loan limit per funding cycle has been updated to \$120 million. Changes may be found on page 2 of the NOFA.

Only those pages with amended language are included in this memo. Please refer to the February 26, 2021 NOFA for full programmatic requirements. **Please note, no additional applications will be accepted under this augmented NOFA. Additional funding will be allocated to projects which submitted an application consistent with the deadlines established under the February 26, 2021 NOFA.**

More information about the AHSC program information is available at <http://www.hcd.ca.gov/grants-funding/active-funding/ahsc.shtml>. To receive information on program updates, please [subscribe](https://www.hcd.ca.gov/HCD_SSI/subscribe-form.html) at https://www.hcd.ca.gov/HCD_SSI/subscribe-form.html to HCD's listserv for the AHSC program. If you have questions, please contact the AHSC program ahsc@hcd.ca.gov

I. Overview

A. Notice of Funding Availability

The California Strategic Growth Council (SGC) and the California Department of Housing and Community Development (Department) hereby announce the availability of approximately **\$785 million** in funding for the Affordable Housing and Sustainable Communities (AHSC) program. The AHSC program is administered by SGC and implemented by the Department. The California Air Resources Board (CARB) provides the quantification methodology for determining the greenhouse gas (GHG) emissions reductions for the AHSC program.

These AHSC program funds will be used for loans or grants, or a combination thereof, to projects that will achieve GHG emissions reductions to benefit all California communities, particularly through increasing accessibility to affordable housing, and key destinations via low-carbon transportation resulting in fewer vehicle miles traveled through shortened or reduced trip length or mode shift from single occupancy vehicle use to transit, bicycling, or walking.

B. Timeline

NOFA Release	February 26, 2021 Amended October 12, 2021
Application Due Date	June 8, 2021
Award Announcement	January 26, 2022

C. Authorizing Legislation and Regulations (Regulatory Authority)

The AHSC program furthers the purposes of Assembly Bill ([AB 32](#)) (Chapter 488, Statutes of 2006), Senate Bill ([SB 375](#)) (Chapter 728, Statutes of 2008), and [SB 32](#) (Chapter 249, Statutes of 2016). Available funds are subject to the AHSC program Guidelines approved by the SGC February 24, 2021, or as amended (Guidelines). The Guidelines include detailed information on eligibility requirements, application selection criteria, established terms, conditions, and procedures for funds awarded under AHSC. The Guidelines are available at <http://www.sgc.ca.gov/programs/ahsc/resources/>.

Applicants are responsible for complying with the AHSC program requirements set forth in the Guidelines, this NOFA, and the application materials. Applicants are encouraged to carefully review the Guidelines and information contained in this NOFA before submitting applications.

II. Program requirements

The following is provided as a summary and is not to be considered a complete representation of the entirety of the eligibility, threshold, or other requirements or terms and conditions of the AHSC program. Please note that capitalized words may be defined terms and can be found in the program Guidelines. Please refer to the Guidelines for complete information.

A. Eligible Applicants

Applicants must be eligible pursuant to Guidelines Section 105, Eligible Applicants.

Please note: A special purpose entity, which is formed and controlled by the Developer, and which will serve as the ultimate borrower of AHSC loan funds, is not an Eligible Applicant, but may be named in the portion of the application that requests the name of the ultimate borrower.

B. Eligible Projects

Eligible projects must fall into one of the following three eligible Project Area types:

- Transit Oriented Development (TOD) Project Area type
- Integrated Connectivity (ICP) Project Area type
- Rural Innovation Project Area (RIPA) type

For a detailed list of all eligible costs, please refer to Guidelines Section 103, Eligible costs.

C. Program funding amounts and terms

- 1. AHSC program funding award maximum:** The maximum AHSC program loan or grant award, or combination thereof, is \$30 million with a minimum award of \$1 million.
- 2. AHSC program funding developer maximum:** A single Developer may receive no more than **\$120 million** per NOFA funding cycle. This limitation may be waived by SGC if necessary, to meet statutory requirements referenced in Guidelines Section 108.
- 3. Terms of assistance:** Assistance terms and limits are set forth in Guidelines Section 104, Assistance terms and limits. Loans for rental Affordable Housing Developments are subject to requirements set forth in Guidelines Section 104(b). Grants are subject to the terms and requirements set forth in Guidelines Section 104(c).

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

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February 4, 2022

Smitha Seshadri, Senior Vice President
 BRIDGE Housing Corporation
 600 California Street, Suite 900
 San Francisco, CA 94108

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

**RE: Award Announcement – AHSC Program, Round 6, FY 2019-20 & FY 2020-21
 PIN 47764 – Balboa Reservoir**

Dear Smitha Seshadri and Eric D. Shaw:

The California Department of Housing and Community Development (Department) and the Strategic Growth Council are pleased to announce that Balboa Reservoir has been awarded an Affordable Housing and Sustainable Communities (AHSC) program award in the amount of \$29,585,486. This letter constitutes notice of the award as approved by the Strategic Growth Council on January 26, 2022 of the following AHSC program funds:

AHSC Program <i>Loan</i> Funds	
Amount Awarded	\$19,610,404
Contract Number	21-AHSC-17011

AHSC Program <i>Grant</i> Funds	
Amount Awarded	\$9,975,082
Contract Number	21-AHSC-17012

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

Congratulations on a successful application. For further information, please contact Craig Shields, Branch Chief, Program Design and Implementation – Climate Change, at (916) 823-6054 or Craig.Shields@hcd.ca.gov.

Sincerely,

Jennifer Seeger
 Deputy Director
 Division of State Financial Assistance

1 [Development Agreement - Reservoir Community Partners, LLC - Balboa Reservoir Project]
2
3 **Ordinance approving a Development Agreement between the City and County of San**
4 **Francisco and Reservoir Community Partners, LLC, for the Balboa Reservoir Project (at**
5 **the approximately 17.6-acre site located generally north of the Ocean Avenue**
6 **commercial district, west of the City College of San Francisco Ocean Campus, east of**
7 **the Westwood Park neighborhood, and south of Archbishop Riordan High School),**
8 **with various public benefits, including 50% affordable housing and approximately 4**
9 **acres of publicly accessible parks and open space; making findings under the**
10 **California Environmental Quality Act, findings of conformity with the General Plan, and**
11 **with the eight priority policies of Planning Code, Section 101.1(b), and findings of**
12 **public convenience, necessity, and welfare under Planning Code, Section 302;**
13 **approving development impact fees and waiving any conflicting provision in Planning**
14 **Code, Article 4, or Administrative Code, Article 10; confirming compliance with or**
15 **waiving certain provisions of Administrative Code, Section 6.22 and Chapters 14B, 23,**
16 **41B, 56, 82, and 83, Planning Code, Sections 169, 138.1, and 414A, 415, and 422, Public**
17 **Works Code, Section 806(d), Subdivision Code, Section 1348, and Health Code, Article**
18 **12C; and ratifying certain actions taken in connection therewith.**

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

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

25 ///

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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23
24
25
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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

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 Affordable Housing and Sustainable Communities (AHSC) Program at 11 Frida Kahlo Way Balboa Reservoir Building E

GRANT TITLE: Affordable Housing and Sustainable Communities Program – Balboa Reservoir Building 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



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 #: 250392

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	DATE OF ORIGINAL FILING (for amendment only)
Original	
AMENDMENT DESCRIPTION – Explain reason for amendment	

2. CITY ELECTIVE OFFICE OR BOARD	
OFFICE OR BOARD	NAME OF CITY ELECTIVE OFFICER
Board of Supervisors	Members

3. FILER'S CONTACT	
NAME OF FILER'S CONTACT	TELEPHONE NUMBER
Angela Calvillo	415-554-5184
FULL DEPARTMENT NAME	EMAIL
office of the Clerk of the Board	Board.of.Supervisors@sfgov.org

4. CONTRACTING DEPARTMENT CONTACT	
NAME OF DEPARTMENTAL CONTACT	DEPARTMENT CONTACT TELEPHONE NUMBER
Ryan vanZuylen	415-701-5500
FULL DEPARTMENT NAME	DEPARTMENT CONTACT EMAIL
MYR Mayor's Office of Comm. Dev.	ryan.vanzuylen@sfgov.org

5. CONTRACTOR	
NAME OF CONTRACTOR Balboa Lee Avenue, L.P.	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) 250392
DESCRIPTION OF AMOUNT OF CONTRACT \$29,585,486		
NATURE OF THE CONTRACT (Please describe) Accept and Expend resolution for the CA HCD AHSC loan and grant amount of \$29,585,486 for a 128-unit 100% affordable housing development known as Balboa Reservoir Building E.		

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	Smitha	Other Principal Officer
5	Van Benschoten	Elizabeth	Other Principal Officer
6	Clark	Sean	Other Principal Officer
7	Brown	Eric R.	Other Principal Officer
8	Hlebaso	Rebecca	Other Principal Officer
9	Jagodzinski	Mary Jane	Other Principal Officer
10	Haynes Martin	Melissa	Other Principal Officer
11	Neufeld	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 E.	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	Daryl 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
33			
34			
35			
36			
37			
38			

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
39			
40			
41			
42			
43			
44			
45			
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47			
48			
49			
50			

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.

<p>SIGNATURE OF CITY ELECTIVE OFFICER OR BOARD SECRETARY OR CLERK</p> <p>BOS Clerk of the Board</p>	<p>DATE SIGNED</p>
---	---------------------------

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: [Accept and Expend Grant - California Department of Housing and Community Development
Affordable Housing and Sustainable Communities Program – Balboa Reservoir Building E-
\$29,585,486]
DATE: April 15, 2025

Resolution authorizing the Mayor’s Office of Housing and Community Development (“MOHCD”) to execute the Standard Agreement with the California Department of Housing and Community Development (“HCD”) under the Affordable Housing and Sustainable Communities Program for a total award of \$29,585,486, including \$19,610,404 disbursed by HCD as a loan to the Balboa Lee Avenue, L.P. (“Developer”) for a 100% affordable housing project at 11 Frida Kahlo and \$9,975,082 to be disbursed as a grant to the City for public transportation improvements near 11 Frida Kahlo, for the period starting on the execution date of the Standard Agreements to November 30, 2042; authorizing MOHCD to accept and expend the grant of up to \$9,975,082 for transportation, streetscape and pedestrian improvements and other transit oriented programming and improvement as approved by HCD.

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