

File No. 251006

Committee Item No. 12

Board Item No. _____

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Committee Date October 22, 2025

Board of Supervisors Meeting Date _____

Cmte Board

- | | | |
|-------------------------------------|--------------------------|--|
| ☐ | ☐ | Motion |
| ☒ | ☐ | Resolution |
| ☐ | ☐ | Ordinance |
| ☐ | ☐ | Legislative Digest |
| ☐ | ☐ | Budget and Legislative Analyst Report |
| ☐ | ☐ | Youth Commission Report |
| ☐ | ☐ | Introduction Form |
| ☒ | ☐ | Department/Agency Cover Letter and/or Report |
| • MYR Memo 9/9/2025 | | |
| ☒ | ☐ | MOU |
| ☒ | ☐ | Grant Information Form |
| ☒ | ☐ | Grant Budget |
| ☐ | ☐ | Subcontract Budget |
| ☒ | ☐ | Contract/Agreement |
| • Draft Grant Standard Agreement | | |
| • Draft Loan Standard Agreement | | |
| ☐ | ☐ | Form 126 – Ethics Commission |
| ☒ | ☐ | Award Letter |
| ☒ | ☐ | Application |
| ☐ | ☐ | Public Correspondence |

OTHER (Use back side if additional space is needed)

- | | | |
|-------------------------------------|--------------------------|---|
| ☒ | ☐ | <u>AHSC Rd 7 Program Guidelines 12/15/2022</u> |
| ☒ | ☐ | <u>CA DHCD Notice of Funding Availability Rd 7 031523</u> |
| ☒ | ☐ | <u>BART Implementation Agreement 4/3/2023</u> |
| ☒ | ☐ | <u>Board Resolution No. 153-23 4/14/2023</u> |
| ☒ | ☐ | <u>MOHCD Presentation 10/22/2025</u> |
| ☐ | ☐ | _____ |
| ☐ | ☐ | _____ |
| ☐ | ☐ | _____ |
| ☐ | ☐ | _____ |

Completed by: Brent Jalipa Date October 16, 2025

Completed by: Brent Jalipa Date _____

1 [Execute Standard Agreements - Accept and Expend Grant - California Department of
2 Housing and Community Development - Affordable Housing and Sustainable Communities
3 Program - 11 Frida Kahlo Way - Balboa Reservoir Building A - \$45,721,399]

4 **Resolution authorizing the Mayor's Office of Housing and Community Development**
5 **("MOHCD") to execute the Standard Agreements 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 \$45,721,399, including**
8 **\$33,000,000 disbursed by HCD as a loan to the Balboa Gateway, L.P. ("Developer") for**
9 **a 100% affordable housing project at 11 Frida Kahlo Way and \$12,721,399 to be**
10 **disbursed as a grant to the City for public transportation improvements near 11 Frida**
11 **Kahlo Way, for the period starting on the execution date of the Standard Agreements**
12 **through November 30, 2043; authorizing MOHCD to accept and expend the grant of up**
13 **to \$12,721,399 for transportation, streetscape and pedestrian improvements and other**
14 **transit oriented programming and improvement as approved by HCD.**

15
16 WHEREAS, The State of California, the Strategic Growth Council ("SGC") and the
17 California Department of Housing and Community Development ("HCD") issued a Notice of
18 Funding Availability ("NOFA") dated January 30, 2023, and subsequently amended on
19 March 15, 2023, under the Affordable Housing and Sustainable Communities ("AHSC")
20 Program established under Division 44, Part 1 of the Public Resources Code commencing
21 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 December 15, 2022 ("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 Gateway 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 159-unit 100% affordable multifamily rental housing development affordable
16 to low-income households(the “Project”) identified as Balboa Building A (the “Balboa Building
17 A”); 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 April 3, 2023, BART and the Developer entered into an Implementation
22 Agreement to make commitments related to the purchase of the BART vehicles as included in
23 the Application package; and

1 WHEREAS, On March 31, 2023, the San Francisco Municipal Transportation Authority
2 (“SFMTA”) and MOHCD entered into a Memorandum of Understanding to make commitments
3 related to 29 Sunset Improvement Project included in the Application package; and

4 WHEREAS, On April 14, 2023, the Board of Supervisors authorized MOHCD to apply
5 for AHSC Program funds and submit an Application Package as a joint applicant with the
6 Developer through Resolution No. 153-23; and

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

9 WHEREAS, Through an award letter dated September 1, 2023, HCD made an award
10 in the total amount of \$45,721,399, which includes \$33,000,000 to be disbursed by HCD as a
11 loan to the Developer for the Project, and up to \$12,721,399 to be disbursed as a grant to the
12 City for the BART vehicles, other transit-oriented programming and improvements, and AHD
13 resident support approved by HCD, subject to the terms and conditions of the Standard
14 Agreements, copies of which are on file with the Clerk of the Board of Supervisors in File
15 No. 251006; now, therefore, be it

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

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

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

24 FURTHER RESOLVED, That the Board of Supervisors authorizes the Director of
25 MOHCD (or his designee) to execute and deliver any documents in the name of the MOHCD

1 that are necessary, appropriate or advisable to accept and expend the AHSC Program funds
2 from HCD, and all amendments thereto, and complete the transactions contemplated herein
3 and to use the funds for eligible capital asset(s) in the manner presented in the application as
4 approved by HCD and in accordance with the NOFA and Program Guidelines and Application
5 Package; and, be it

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

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

1 Recommended:

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

5
6 Approved:

7 /s/ /s/
8 Daniel Lurie, Mayor Greg Wagner, Controller

File Number: 251006
(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 A

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: \$12,721,399

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: 11/30/2043

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):

☐ Existing Site(s)	☐ Existing Structure(s)	☐ Existing Program(s) or Service(s)
☐ Rehabilitated Site(s)	☐ Rehabilitated Structure(s)	☒ New Program(s) or Service(s)
☐ New Site(s)	☒ New Structure(s)	

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

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

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

Comments:

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

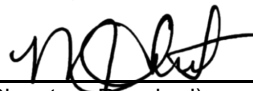
Madeleine Sweet

(Name)

Compliance Coordinator – Data, Evaluation and Compliance

(Title)

Date Reviewed: 2/21/2025


(Signature Required)

Department Head or Designee Approval of Grant Information Form:

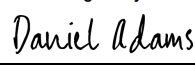
Daniel Adams

(Name)

Director, Mayor's Office of Housing and Community Development

(Title)

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

DocuSigned by:

(Signature Required)

HCD AHSC Balboa Reservoir Building A Grant Expenditure Schedule

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

Amount	Agency	Project Description	HCD Funding
STI #1	BART	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	SFMTA	The San Francisco Municipal Transportation Agency (SFMTA) 29 Sunset Improvement Project aims to improve the performance of and passenger experience on the Muni 29 Sunset bus route. The 29 Sunset Improvement Project is part of the SFMTA's Muni Forward program, which is focused on reducing delays on major Muni routes. Phase Two of the project includes the segment east of Junipero Serra. Proposed improvements consist of the following: removal of some stops; relocation of other stops; improvements of amenities at some stops; and implementation of transit signal priority (TSP) at intersections for over one lane-mile. Stop removal and relocation and TSP implementation would serve to reduce delays, thus reducing travel times and improving schedule reliability or on-time performance. Passenger experience will be improved through safer access to the bus stops achieved with improved visibility at intersections and shorter crosswalk distances.	\$2,500,000
STI #3	BRIDGE Housing Corporation	1 Miles of Class III -B Context Sensitive Bikeway with traffic calming features such as speed humps and way finding, over 2500 continous feet of new Safe & Accessible Sidewalk. This is fully contained within the Balboa Reservoir master planned project, which BRIDGE Housing Corporaton is the master developer.	\$2,682,869

HCD AHSC Balboa Reservoir Building A Grant Expenditure Schedule

TRA	SFMTA	The 29 Sunset Phase II project will include the installation of at least four new bus bulbouts to enhance the safety and convenience of riders. All of these bulbouts will be at transit stops, thus meeting the "at or along a block-face" requirement for TRA points.	\$1,500,000
PGM #1	BRIDGE Housing Corporation	In addition to the basic resident services offered to AHD residents, this program will provide instructor-led adult education, health and wellness, or skill building classes. This includes, but is not limited to: Financial literacy, computer training, home-buyer education, GED classes, and resume building classes, ESL, nutrition class, exercise class, health information/awareness, art class, parenting class, on-site food cultivation and preparation classes, and smoking cessation classes. Excludes: Drop-in computer labs, monitoring or technical assistance.	\$150,000
PGM #2	BRIDGE Housing Corporation	Each of the restricted units will be provided with one (1) free transit pass 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.	\$553,896
PGM #3	Eviction Defense Collaborative	Eviction Defense Collaborative (EDC) supports tenants struggling with rent increases, evictions, housing discrimination and landlord harassment by providing them with free legal representation when they cannot afford to pay for an attorney. For 27 years, EDC has been the only agency in San Francisco (SF) solely dedicated to eviction prevention, processing 99% of all the eviction notices filed in the city. EDC's wraparound service model includes legal services for eviction defense, rapid emergency rental assistance and subsidies for those at risk of eviction and displacement, and advocacy for unhoused San Franciscans facing eviction from City shelters. Since 2019, EDC has served as the lead partner with the City of San Francisco for the implementation of SF Tenant Right to Counsel (TRC), which guarantees all San Francisco tenants full scope legal representation in an eviction matter. In this role, EDC coordinates and	\$150,000

HCD AHSC Balboa Reservoir Building A Grant Expenditure Schedule

		oversees the work of 9 legal service organizations comprising the city-wide TRC system.	
PGM #4	GRID Alternatives	As a workforce partner in the AHSC Balboa Reservoir Project, 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. GRID's solar training program is a low-barrier design, meeting trainees "where they are at" and no previous experience is required.	\$150,000

Total: \$12,721,399

STANDARD AGREEMENT

STD 213 (Rev. 04/2020)

SCO ID:

AGREEMENT NUMBER

23-AHSC-17950

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

11/30/2043

3. The maximum amount of this Agreement is:

\$12,721,399.00

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	3
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	17
TOTAL NUMBER OF PAGES ATTACHED		40

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: _____

Brad Wiblin

Executive Vice President

Address:

600 California St, 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, Fifth Floor. Attn: MOHCD
San Francisco, CA 94103

DRAFT

AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

AGREEMENT NUMBER

23-AHSC-17950

AMENDMENT NUMBER

12. AGREEMENT

AGREEMENT	TERM FROM	TERM THROUGH	TOTAL COST OF THIS TRANSACTION	BID, SOLE SOURCE, EXEMPT
Original		11/30/2043	\$ 12,721,399.00	Exempt
Amendment No. 1				
Amendment No. 2				
Amendment No. 3				
		TOTAL	\$ 12,721,399.00	

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

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

B. STD.204 Vendor Data Record

☐ No ☐ Yes ☒ N/A☐ 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

AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

AGREEMENT NUMBER

23-AHSC-17950

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

EXHIBIT E

PROJECT-SPECIFIC PROVISIONS AND SPECIAL TERMS AND CONDITIONS

1. Project-Specific Provisions

The following are project-specific terms and conditions (and shall inform the references made to project-specific information not contained in prior exhibits).

Provision Ex. A-E.1 (As Referenced in Exhibit A, section 1)

The Project Report is dated October 18, 2023.

Provision Ex. A-E.2 (As Referenced in Exhibit A, section 1)

The Award Letter is dated September 01, 2023.

Provision Ex. A-E.3 (As Referenced in Exhibit A, section 3)

The Scope of Work ("Work") for this Agreement shall consist of one or more of the following categories, by or on behalf of the Recipient, within the Program Project Area:

Included ("x")	Grant Award Categories
N/A	Housing Related Infrastructure (HRI)
X	Program Costs (PGM)
X	Sustainable Transportation Infrastructure (STI)
X	Transportation-Related Amenities (TRA)

EXHIBIT E

Provision Ex. A-E.4 (As Referenced in Exhibit A, section 3)

The Development that is identified in the Award Letter and described in the Application, and that is supported by the HRI Work, if any, and which is to be developed and constructed by the Recipient, or other developer on behalf of the Recipient, contains the following unit mix:

11 Frida Kahlo Way San Francisco, CA 94112 APN: 3180-201, 3180-002, Lot 190, BLOCK 3180 (PORTION) County: San Francisco		Balboa Building A		
Enter the number of units by bedroom size and income limit.				
# of Bedrooms	# of Project Units	AHSC Assisted Units*	Income Limit (Percent of AMI)	TOTAL RESTRICTED UNITS**
0	3	3	30%	3
0	7	7	50%	7
0	7	7	60%	7
1	12	12	30%	12
1	13	13	50%	13
1	21	21	60%	21
2	14	14	30%	14
2	10	10	50%	10
2	29	29	60%	29
3	11	11	30%	11
3	10	10	50%	10
3	21	21	60%	21
2	1	0	Manager	0
Total Project Units	159	158		158

EXHIBIT E

* 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).

**Total Restricted units include all units restricted by the Program and the Tax Credit Allocation Committee (TCAC). The HRI Grant amount, if any, was calculated based on the number of Total Restricted Units.

Provision Ex. A-E.5 (As Referenced in Exhibit A, section 3A)

Housing Related Infrastructure

The Scope of Work for this Agreement for Housing Related Infrastructure (“HRI Work”) shall consist of the following: N/A

Provision Ex. A-E.6 (As Referenced in Exhibit A, section 3B)

Program Costs

The Scope of Work for this Agreement for Program (PGM) Costs (“PGM Work”), shall consist of the following:

The first PGM component, BRIDGE will provide on-site instructor-led adult education, health and wellness or skill building classes. Classes that include: financial literacy, computer training, home-buyer education, general education (GED) classes, resume building classes, English as a Second Language (ESL), nutrition and exercise classes, health information and awareness, art, parenting, food preparation, and smoking cessation classes.

The second PGM component will provide each of the restricted units (1) free transit pass for three years consisting of forty commute length rides a month.

The third PGM component will have Bridge partnering with Eviction Defense Collaborative (EDC), providing support and free legal representation to tenants struggling with rent increases, evictions, housing discrimination and landlord harassment.

EXHIBIT E

The fourth PGM component, GRID Alternatives will extend a solar training program for up to 20 project area residents. This training provides virtual and hands-on solar installation learning opportunities, focusing on skills to help qualify for jobs in the solar industries.

Commercial Space

The Project has no proposed commercial space.

Provision Ex. A-E.7 (As Referenced in Exhibit A, section 3C)

Sustainable Transportation Infrastructure

The Scope of Work for this Agreement for Sustainable Transportation Infrastructure (“STI Work”) shall consist of the following:

The first STI component is the purchase two new BART cars as part of the Transbay Corridor Core Capacity Program. This will increase the number of trains during peak hours which increases the capacity to carry passengers.

The second STI component, the San Francisco Municipal Transportation Agency (SFMTA) 29 Sunset Improvement Project aims to improve the performance of and passenger experience on the Muni 29. This project is focused on reducing delays on major Muni routes. This consists of: removal of some stops; relocation of stops; improvement of amenities at some stops; and the implementation of transit signal priority (TSP). All will serve to reduce delays and improve travel times and create more reliable service.

The third STI component will create one mile of Class III - B Context Sensitive Bikeway with traffic calming features and adding 2,500 continuous feet of sidewalk.

Provision Ex. A-E.8 (As Referenced in Exhibit A, section 3D)

Transportation-Related Amenities

The Scope of Work for this Agreement for Transportation-Related Amenities (“TRA Work”) shall consist of the following:

The TRA component, the City of San Francisco through the Muni Forward Project will install at least four new bus bulb outs to enhance safety and convenience of bus riders.

Affordable Housing and Sustainable Communities (AHSC) Program

Round 7 - Grant

NOFA Date: 01/30/2023, Amended 03/15/2023

Approved Date: 05/03/2023

Prep. Date: **TO BE ADDED**

EXHIBIT E

These bulb outs will be at transit stops which will meet the "at or along a block-face" requirement for TRA points.

Provision Ex. A-E.9 (As Referenced in Exhibit A, section 4)

Criteria Applicability

Based on the points awarded to its Application, Recipient assures the Department of the existence of the following criteria of Section 107 in the Guidelines

AHSC Round 7 Guidelines, Section 107 Reference	Application Score
(a) GHG Transit and Shared Mobility	4
(b) GHG Project Area	6
(c) GHG Efficiency	9
(d) Active Transportation and Transit Improvements	12
(e) Green Buildings and Renewable Energy	3
(f) Housing and Transportation Collaboration	10
(g) Location Efficiency and Access to Destinations	3
(h) Funds Committed	4
(i) Prohousing Designation	2
(j) Anti-Displacement Activities	4
(k) Local Workforce Development and Hiring Practices	3
(l) Housing Affordability	4
(m) Programs	3
(n) Community Benefits & Engagement	5
(o) Climate Adaptation & Community Resiliency	1
(p) Collaboration & Planning	4
(q) Equity & Transformation	3

Provision Ex. A-E.10 (As Referenced in Exhibit A, section 4A)

GHG Emissions Reductions Estimate

Based on the inputs in the Application, the estimated total MTCO₂e over the life of the project is 29,576. This information can be found on the SGC's website in a document titled Round 7 Data for Public Release

EXHIBIT E

Provision Ex. A - E.11 (As Referenced in Exhibit A, section 5)

Performance Milestones

Recipient shall ensure the completion of the Performance Milestones set forth by the designated dates as found below:

HRI PERFORMANCE MILESTONES	DATE
Executed binding agreement between the Recipient and developer of the proposed Development detailing the terms and conditions of the Project development.	N/A
Site Control of Development site(s) by proposed housing developer.	N/A
Completion of all necessary environmental clearances, including those required under CEQA and NEPA.	N/A
Obtaining all necessary and discretionary public land use approvals.	N/A
Obtaining all enforceable funding commitments for at least the first phase of the Development supported by HRI.	N/A
Obtaining all enforceable funding commitments for all construction period financing for the HRI.	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.	N/A
Submission of final construction drawings and specifications to the appropriate local building department or permitting authority.	N/A
Commencement of construction of the HRI.	N/A
Construction of HRI complete.	N/A
Program funds fully disbursed.	N/A

EXHIBIT E

PGM PERFORMANCE MILESTONES	DATE
Identification and commitment of program operator and partners.	
Completion of a business or a work plan.	
Program funds fully disbursed.	

STI PERFORMANCE MILESTONES	DATE
Executed binding agreement between the Recipient and developer of the STI Work detailing the terms and conditions of the Project development.	
Site Control of STI site(s) by proposed developer.	
Completion of all necessary environmental clearances, including those required under CEQA and NEPA.	
Obtaining all necessary and discretionary public land use approvals.	
Submission of final construction drawings and specifications to the appropriate local permitting authority.	
Commencement of construction of STI.	
Construction completion of STI and closeout.	
Program funds fully disbursed.	

EXHIBIT E

TRA PERFORMANCE MILESTONES	DATE
Executed binding agreement between the Recipient and developer of the TRA Work detailing the terms and conditions of the Project development.	
Site Control of TRA site(s) by proposed developer.	
Completion of all necessary environmental clearances, including those required under CEQA and NEPA.	
Obtaining all necessary and discretionary public land use approvals.	
Submission of final construction drawings and specifications to the appropriate local permitting authority.	
Commencement of construction of TRA.	
Construction completion of TRA and closeout.	
Program funds fully disbursed.	

EXHIBIT E

Provision Ex. A-E.12 (As Referenced in Exhibit A, section 7)

Recipient Contact Coordinator

The Recipient's Contract Coordinator for this Agreement is listed below. Unless otherwise informed, any notice, report, or other communication required by this Agreement shall be mailed by first class to the contact at the following address:

Recipient:	BRIDGE Housing Corporation
Authorized Representative Name:	Smitha Seshadri
Authorized Representative Title:	Executive Vice President
Address:	600 California Street, Ste. #900 San Francisco, CA 94108
Phone No.:	415-989-1111
Email:	sseshadri@bridgehousing.com

Recipient:	City and County of San Francisco
Authorized Representative Name:	Sara Amaral
Authorized Representative Title:	Director of Housing Development
Address:	1 South Van Ness Avenue, 5 th Floor San Francisco, CA 94103
Phone No.:	628-652-5808
Email:	Sara.amaral@sfgov.org

EXHIBIT E

Provision Ex. B-E.1 (As Referenced in Exhibit B, section 2(A)(1))

For the purposes of performing the HRI Work, as set forth in provision Ex. A-E.5 of this Exhibit E, the Department agrees to provide N/A.

Provision Ex. B-E.2 (As Referenced in Exhibit B, section 2(A)(2))

For the purposes of performing the PGM Work, as set forth in provision Ex. A-E.6 of this Exhibit E, the Department agrees to provide \$1,003,896.

Provision Ex. B-E.3 (As Referenced in Exhibit B, section 2(A)(3))

For the purposes of performing the STI Work, as set forth in provision Ex. A-E.7 of this Exhibit E, the Department agrees to provide \$10,217,503.

Provision Ex. B-E.4 (As Referenced in Exhibit B, section 2(A)(4))

For the purposes of performing the TRA Work, as set forth in provision Ex. A-E.8 of this Exhibit E, the Department agrees to provide \$1,500,000.

Provision Ex. B-E.5 (As Referenced in Exhibit B, section 6)

All payees receiving Grant funds are listed below:

Payee Name	Activity	Award Amount
City and County of San Francisco	STI	\$10,217,503
City and County of San Francisco	TRA	\$1,500,000
BRIDGE Housing Corporation	PGM	\$1,003,896

EXHIBIT E

Provision Ex. B - E.6 (As Referenced in Exhibit B, section 6C)

SOURCES AND USES - HRI
PROJECT BUDGET

INFRASTRUCTURE DEVELOPMENT BUDGET AND SOURCES				
Balboa Building A			BRIDGE Housing Corporation	
ESTIMATED HRI CAPITAL IMPROVEMENT PROJECT COSTS			DEVELOPMENT COSTS BY FUNDING SOURCE	
DEVELOPMENT COSTS				
COST CATEGORY		TOTAL AMOUNT	AHSC GRANT PROGRAM	SUM OF ALL OTHER FUNDING
PROJECT ACTIVITY (HARD COSTS)				
Total Project Activity Costs		\$0.00	\$0.00	\$0.00
SOFT COSTS AND OTHER PROJECT RELATED COSTS				
Total Soft Cost and Other Project Related Costs		\$0.00	\$0.00	\$0.00
TOTAL PROJECT COSTS		\$0.00	\$0.00	\$0.00

EXHIBIT E

Provision Ex. B-E.7 (As Referenced in Exhibit B, section 6C)

SOURCES AND USES – PROGRAM COSTS
PROJECT BUDGET

BUDGET AND SOURCES				
Balboa Building A			BRIDGE Housing Corporation	
ESTIMATED PROGRAM COSTS			DEVELOPMENT COSTS BY FUNDING SOURCE	
DEVELOPMENT COSTS				
COST CATEGORY		TOTAL AMOUNT	AHSC GRANT PROGRAM	SUM OF ALL OTHER FUNDING
SOFT COST AND OTHER PROJECT RELATED COSTS				
Total Soft Cost and Other Project Related Costs		\$1,003,896	\$1,003,896	\$0.00
TOTAL PROGRAM COSTS		\$1,003,896	\$1,003,896	\$0.00

EXHIBIT E

Provision Ex. B-E.8 (As Referenced in Exhibit B, section 6C)

**SOURCES AND USES - STI
 PROJECT BUDGET**

INFRASTRUCTURE DEVELOPMENT BUDGET AND SOURCES				
Balboa Building A			City and County of San Francisco	
ESTIMATED STI CAPITAL IMPROVEMENT PROJECT COSTS			DEVELOPMENT COSTS BY FUNDING SOURCE	
DEVELOPMENT COSTS				
COST CATEGORY		TOTAL AMOUNT	AHSC GRANT PROGRAM	SUM OF ALL OTHER FUNDING
PROJECT ACTIVITY (HARD COSTS)				
Total Project Activity Costs		\$12,736,257	\$10,217,503	\$2,518,754
SOFT COSTS AND OTHER PROJECT RELATED COSTS				
Total Soft Cost and Other Project Related Costs		\$4,758,108	\$0.00	\$4,758,108
TOTAL PROJECT COSTS		\$17,494,365	\$10,217,503	\$7,276,862

EXHIBIT E

Provision Ex. B-E.9 (As Referenced in Exhibit B, section 6C)

SOURCES AND USES – TRA
PROJECT BUDGET

INFRASTRUCTURE DEVELOPMENT BUDGET AND SOURCES				
Balboa Building A			City and County of San Francisco	
ESTIMATED TRA CAPITAL IMPROVEMENT PROJECT COSTS			DEVELOPMENT COSTS BY FUNDING SOURCE	
DEVELOPMENT COSTS				
COST CATEGORY		TOTAL AMOUNT	AHSC GRANT PROGRAM	SUM OF ALL OTHER FUNDING
PROJECT ACTIVITY (HARD COSTS)				
Total Project Activity Costs		\$1,702,500	\$1,500,000	\$202,500
SOFT COSTS AND OTHER PROJECT RELATED COSTS				
Total Soft Cost and Other Project Related Costs		\$0.00	\$0.00	\$0.00
TOTAL PROJECT COSTS		\$1,702,500	\$1,500,000	\$202,500

EXHIBIT E

Provision Ex. D-E.1 (As Referenced in Exhibit D, section 28)

Balboa Building A

THIS PROJECT HAS BEEN MADE POSSIBLE
BY FINANCING FROM

CALIFORNIA CLIMATE INVESTMENTS
(Funded through the GREENHOUSE GAS REDUCTION FUND)
AFFORDABLE HOUSING AND SUSTAINABLE COMMUNITIES PROGRAM
THROUGH THE
STRATEGIC GROWTH COUNCIL AND
THE CALIFORNIA DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT

2. Special Conditions

2a. The Department will assess Negative Points, as applicable, to Sponsor(s)/Applicant(s)/Recipient(s) subject to Administrative Notice 2022-01, dated March 31, 2022, and any future amendments. The Negative Points policy is applicable to all HCD state and federal funding programs – loans and grants, administered by HCD's Divisions of State and Federal Financial Assistance. Negative points will be calculated based on the criteria outlined in the Notice and will be applicable to all Notices of Funding Availability issued on or after the original date of this notice for the previous 5-year period, except when noted or amended. Such determination will be on a case-by-case basis and may use the enumerated criteria set forth in the Notice when making such decisions. In addition, the Department reserves the right, in its sole discretion, to revoke an entity's eligible Sponsor/Applicant/Recipient status at any time based on documented serious issues with the operation, maintenance or implementation of project or program funds.

2b. The Department retains the right and discretion to disencumber awards where awardees have failed to make sufficient progress in meeting applicable milestones and deadlines subject to Administrative Notice 2022-02 dated March 30, 2022, and any future amendments. Such determination will be on a case-by-case basis, and may use the enumerated criteria set forth in the Notice when making such decisions. The disencumbrance policy is applicable to HCD state funded multifamily housing programs. For awards made prior to July 1, 2022, the 24-month period shall begin on July 1, 2022. For awards made on or after July 1, 2022, the 24-month period will begin as of the date of the initial program funding awarded to the project, unless amended in a subsequent Notice.

Affordable Housing and Sustainable Communities (AHSC) Program

Round 7 - Grant

NOFA Date: 01/30/2023, Amended 03/15/2023

Approved Date: 05/03/2023

Prep. Date: **TO BE ADDED**

STANDARD AGREEMENT

STD 213 (Rev. 04/2020)

SCO ID:

AGREEMENT NUMBER
23-AHSC-17949

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 Gateway LP, 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

11/30/2043

3. The maximum amount of this Agreement is:

\$33,000,000.00

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	1
Exhibit C*	State of California General Terms and Conditions	GTC - 04/2017
Exhibit D	AHSC Program Terms and Conditions	23
Exhibit E	Project Specific Provisions and Special Terms and Conditions	8
TOTAL NUMBER OF PAGES ATTACHED		37

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

Page 2 of 2

Balboa Gateway LP

a California limited partnership

By: Balboa Gateway LLC
a California limited liability company

Its: Managing General Partner

By: BRIDGE Housing Corporation
a California nonprofit public benefit corporation

Its: Manager

By: _____ Date: _____

Brad Wiblin
Executive Vice President

Address:

600 California Street, Ste. #900
San Francisco, CA 94108

BRIDGE Housing Corporation

a California nonprofit public benefit corporation

By: _____ Date: _____

Brad Wiblin
Executive Vice President

Address:

600 California Street, Suite 900
San Francisco, CA 94108

City and County of San Francisco

a California

By: _____ Date: _____

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

Address:

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

AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

AGREEMENT NUMBER

23-AHSC-17949

AMENDMENT NUMBER

12. AGREEMENT

AGREEMENT	TERM FROM	TERM THROUGH	TOTAL COST OF THIS TRANSACTION	BID, SOLE SOURCE, EXEMPT
Original		11/30/2043	\$ 33,000,000.00	Exempt
Amendment No. 1				
Amendment No. 2				
Amendment No. 3				
		TOTAL	\$ 33,000,000.00	

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 (<i>Print or Type</i>)	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

B. STD.204 Vendor Data Record

☐ No ☐ Yes ☒ N/A

☐ 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 (<i>Print or Type</i>)	DATE SIGNED
	Contracts Office / Contracts Analyst	

AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

AGREEMENT NUMBER

23-AHSC-17949

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 BUILDING A

11 Frida Kahlo Way

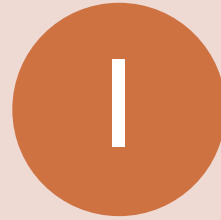
BUDGET AND FINANCE
COMMITTEE

OCTOBER 22, 2025

MAYOR'S OFFICE OF HOUSING AND
COMMUNITY DEVELOPMENT

BALBOA RESERVOIR BUILDINGS A

Budget and Finance Committee – October 22, 2025

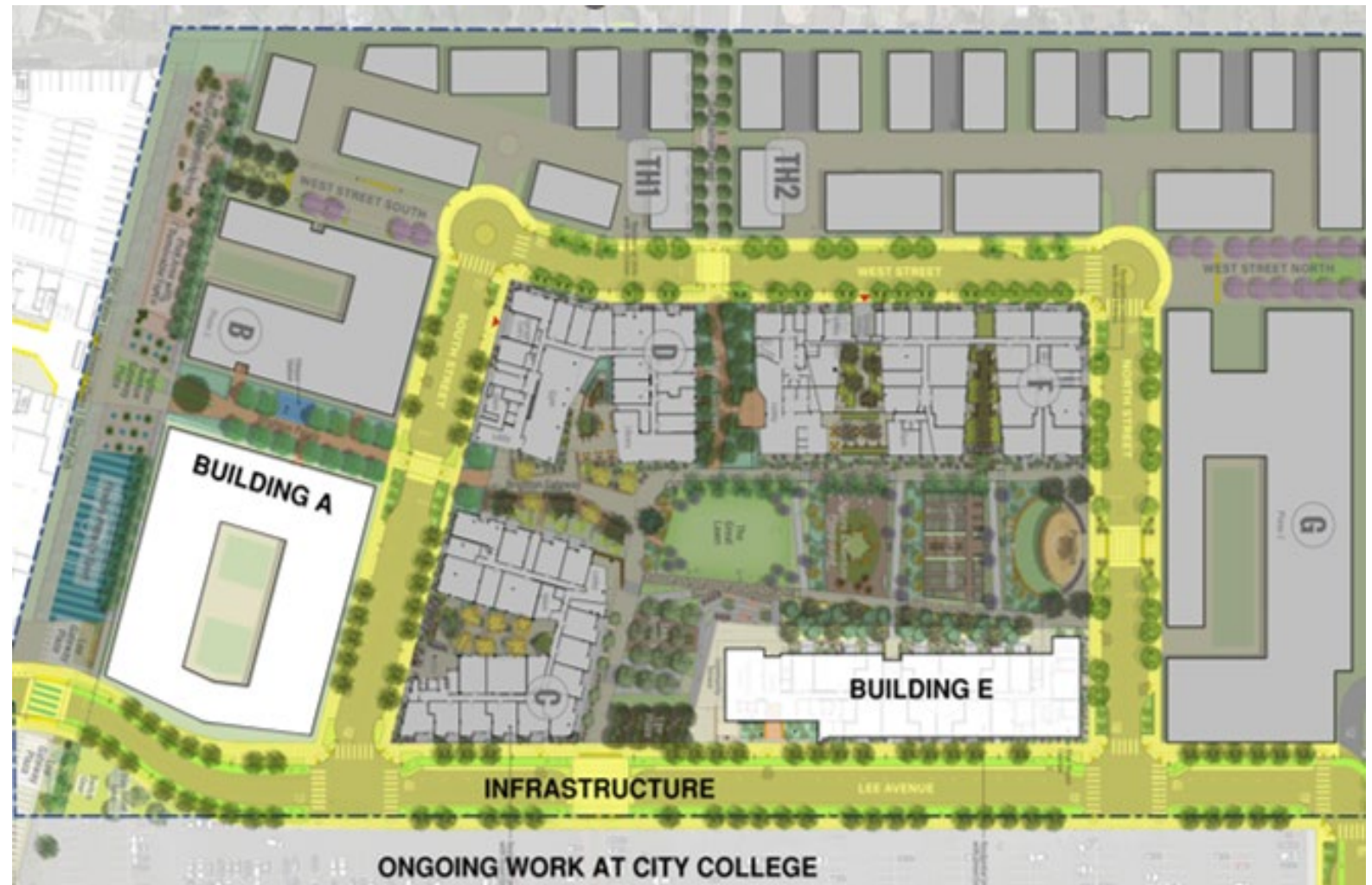


File #251006

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

BALBOA RESERVOIR

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





BALBOA RESERVOIR BUILDING A

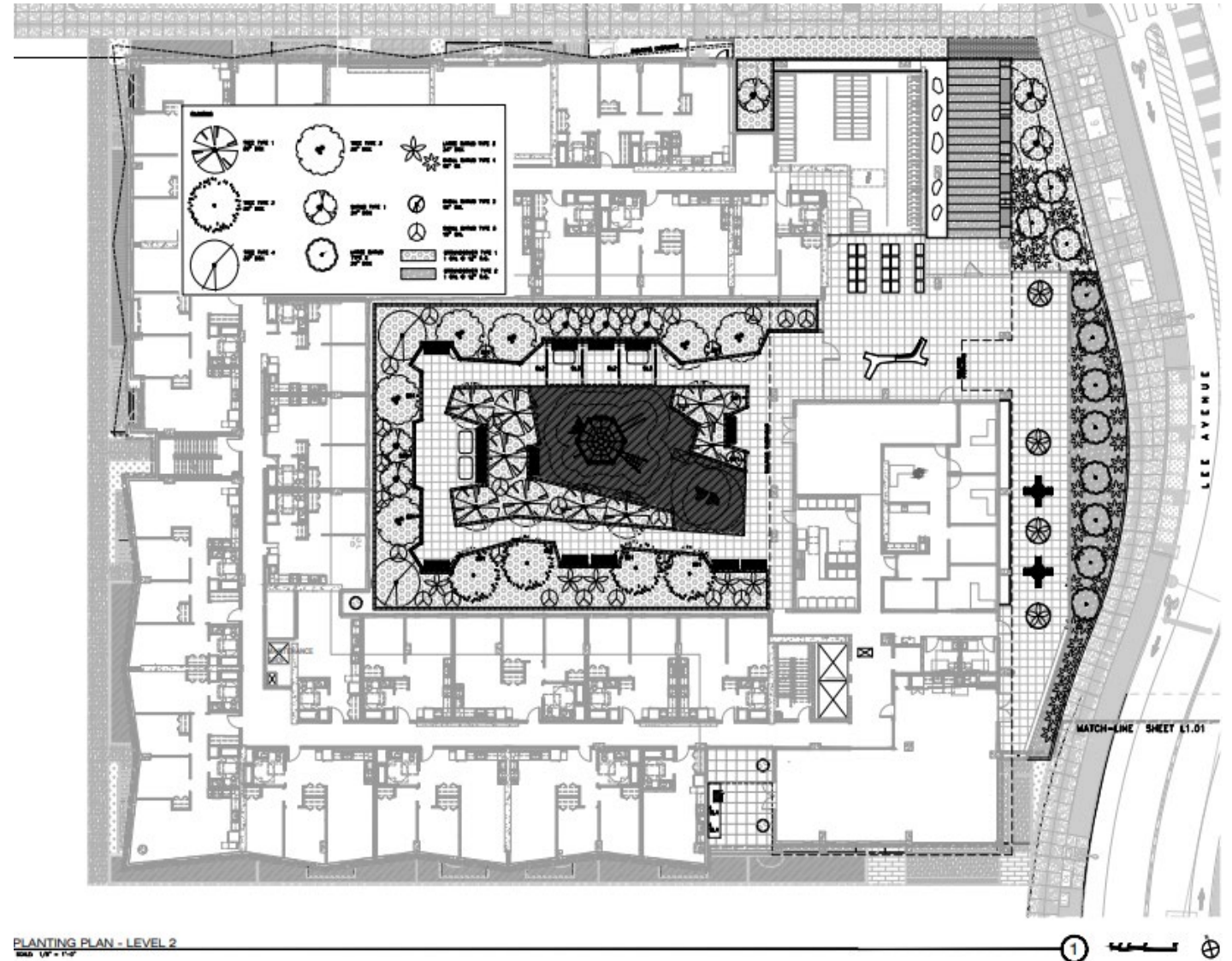
- 2nd 100% affordable development at Balboa Reservoir
- Development Sponsor is BRIDGE Housing
- 158 affordable units, one non-restricted manager's unit (159 total)
- 41 units at 40% AMI, 38 units at 70% AMI, 79 units at 80% AMI

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





Andrew Strong, *Project Manager*
*Mayor's Office of Housing and Community
Development*

Thank you!

**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



September 1, 2023

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

Sara Amaral, Director of Housing
Development
City and County of San Francisco
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103

Dear Smitha Seshadri and Sara Amaral:

**RE: Conditional Award Commitment and Acceptance of Terms and Conditions
Affordable Housing and Sustainable Communities (AHSC)
Fiscal Year 2022/2023, Round 7
BRIDGE Housing Corporation and City and County of San Francisco –
Balboa Building A
Contract No. 23-AHSC-17949 and 23-AHSC-17950**

The California Department of Housing and Community Development (“**Department**”) issued a Notice of Funding Availability on January 30, 2023, and subsequently amended on March 15, 2023, (the “**Affordable Housing and Sustainable Communities NOFA**”). The Department is now pleased to inform you of this conditional award to BRIDGE Housing Corporation and the City and County of San Francisco (“**Awardees**”). This conditional award is a loan and grant in the amount of \$45,721,399 (the “**Conditional Award**”) for the above-referenced project (the “**Project**”) and includes the following:

AHSC Program Award Components	Award Amount	Contract Number
AHSC Program Loan Award	\$33,000,000	23-AHSC-17949
AHSC Program Grant Award	\$12,721,399	23-AHSC-17950

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

I. Applicant Representations – Basis of Conditional Award

In response to the Affordable Housing and Sustainable Communities NOFA, the Awardees submitted an application for financing of the Project (that application, and all communications and documentation submitted to the Department in support thereof, the “**Application**”).

Affordable Housing and Sustainable Communities, Round 7, Conditional Award Commitment
Balboa Building A
September 1, 2023
Page 2

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

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

II. Terms and Conditions of Conditional Award

The Department may rescind this Conditional Award if any of the terms and conditions enumerated in this Section II (the “**Terms and Conditions of Conditional Award**”) are not timely satisfied. TIME IS OF THE ESSENCE IN THE SATISFACTION OF THESE TERMS AND CONDITIONS OF CONDITIONAL AWARD

The Terms and Conditions of Conditional Award and their corresponding timelines are described below. All timelines shall be calculated in calendar days. Any deadline falling on a weekend or State of California holiday shall be extended to the next business day.

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

1. Timely Execution of Acceptance of Terms and Conditions of Conditional Award Form:

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

2. Timely Delivery of Authorization and Organizational Documents:

The Awardees shall deliver to the Department, within sixty (60) calendar days of the date upon this Conditional Award Commitment, a legally sufficient set of Authorization and Organizational Documents, as further described and specified below. Specifically, the Awardees shall deliver a duly adopted authorizing resolution, as well as a complete and duly filed or adopted set of organizational documents and

Affordable Housing and Sustainable Communities, Round 7, Conditional Award Commitment
Balboa Building A
September 1, 2023
Page 3

all amendments (the “**Authorization and Organizational Documents**”), for each of the following entities as applicable: each Awardee entity; the ultimate borrower of the Conditional Award funds (the “**Borrower**”); and each separate legal entity that is part of the Awardee’s or Borrower’s organizational structure. Each entity’s resolution must constitute, to the Department’s reasonable satisfaction, an unconditional, duly adopted, and legally binding authorization of the entity to accept the total amount of these Conditional Award funds, to fully participate in the relevant Department program, and to be legally bound by the requirements of the Department program. The Department may agree to an extension of fifteen (15) calendar days based on the Awardee’s demonstration of necessity.

Note: Local Public Entities, as defined in the Affordable Housing and Sustainable Communities Program Round 7 Program Guidelines, are not required to submit a complete and duly filed or adopted set of organizational documents and amendments. Both the Conditional Award and this Conditional Award Commitment are subject to Health and Safety Code section 50406, subdivision (p), as subsequently amended (“**AB 1010**”).

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

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

III. Delivery of Standard Agreement

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

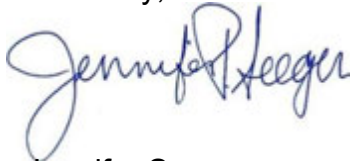
Affordable Housing and Sustainable Communities, Round 7, Conditional Award Commitment
Balboa Building A
September 1, 2023
Page 4

IV. Deadline to Secure Permanent Financing

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

Congratulations on your successful Application. For further information, please contact Alisha Senter, AHSC Manager, Program Design and Implementation Branch, at (916) 776-7588 or Alisha.Senter@hcd.ca.gov.

Sincerely,

A handwritten signature in blue ink that reads "Jennifer Seeger". The signature is fluid and cursive, with the first name "Jennifer" written in a larger, more prominent script than the last name "Seeger".

Jennifer Seeger
Deputy Director
Division of State Financial Assistance

Enclosure: Acceptance of Terms and Conditions of Conditional Award form

Department of Housing and Community Development

Affordable Housing and Sustainable Communities

Acceptance of Terms and Conditions of Conditional Award

BRIDGE Housing Corporation and City and County of San Francisco ("**Awardees**")
Balboa Building A ("**Project**")

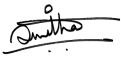
Affordable Housing and Sustainable Communities (AHSC) award totaling \$45,721,399 ("**Conditional Award**") as detailed below:

AHSC Program Award Components	Award Amount	Contract Number
Loan Award	\$33,000,000	23-AHSC-17949
Grant Award	\$12,721,399	23-AHSC-17950
HRI component	\$0	
STI component	\$10,217,503	
TRA component	\$1,500,000	
PGM component	\$1,003,896	

By signing this Acceptance of Terms and Conditions of Conditional Award, the Recipient acknowledges having read and fully understood the terms and conditions of the Conditional Award Commitment, dated September 1, 2023, in connection with the Capital Improvement Project.

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

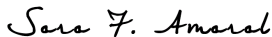
The Recipient must acknowledge that it has reviewed and verified the accuracy of the final project report prepared by the Department no later than October 1, 2023.



 Smitha Seshadri, Senior Vice President
 BRIDGE Housing Corporation

9/15/2023 | 4:08 AM PDT

 Date



 Sara Amaral, Director of Housing Development
 City and County of San Francisco

9/14/2023 | 7:53 PM PDT

 Date

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

☐ Authorized Representatives Verified

☐ All Parties Signed

Date Received: _____

Affordable Housing and Sustainable Communities Program (AHSC)

NOFA Round 7 (January 30, 2023)

Funding Application



CALIFORNIA STRATEGIC
GROWTH COUNCIL



State of California

Gavin Newsom, [Governor](#)

Business, Consumer Services and Housing Agency

Lourdes M. Castro Ramirez, [Secretary](#)

<https://www.bcsb.ca.gov/>

California Strategic Growth Council

Lynn von Koch-Liebert, [Executive Director](#)

ahsc@sgc.ca.gov

<https://sgc.ca.gov>

Department of Housing and Community Development (HCD)

Gustavo Velasquez, [Director](#)

2020 West El Camino Avenue, Suite 150, Sacramento, CA 95833

AHSC@hcd.ca.gov

<https://www.hcd.ca.gov>

Instructions

When opening this file, a yellow banner at the top may appear with a button that says, "Enable Editing", and/or "Enable Macros". It is essential that you click this box(es) so that the macros are enabled. Enabling macros is necessary for full workbook/application functionality.

WARNING: Partial functionality of this application/workbook **WILL BE LOST** when using **Apple Mac Computers**. The Department **highly** recommends using PC Computers and Microsoft Office 2013 or newer to complete the application.

Application materials must be submitted electronically via HCD portal system. Requirements for uploading the Application Workbook and required supporting documentation, including naming conventions, are described in the application instructions available at <https://www.hcd.ca.gov/grants-and-funding/programs-active/affordable-housing-and-sustainable-communities>

Sponsor/Applicant must upload all application materials to HCD portal no later than 4:00 p.m. Pacific Daylight Time on

4/4/2023

Application must be on the Department's forms and cannot be altered or modified by the Sponsor/Applicant. Excel Application must be in Excel format, not a PDF document.

If the Sponsor/Applicant discover any errors within application, use the Application Support tab and email the entire workbook to AppSupport@hcd.ca.gov

It is recommended that Applicant(s) start from left to right and top to bottom for a better understanding and functionality of this application.

Additional instructions and guidance are given throughout the Application in "red" text and in [cell comments](#). Cell Notes/Comments are very important to read as some of these will provide directions for completing your application.

"Yellow" cells

are for Applicant input. It is very important that you answer **ALL** yellow cells, failure to provide all information may disqualify your application from consideration or may negatively impact your point score.

"Orange" cells

are **required** attachments. Failure to provide the required attachments and documentation may disqualify your application from consideration or may negatively impact your point score. Electronically attached files must use the naming convention in the Application.

"Blue" cells

are self-score points awarded in the "Scoring" worksheet. These are automated calculations based on the inputs provided by the Sponsor/Applicant.

"Red" cells

indicate the Applicant(s) has failed to meet a requirement of the program, threshold, scoring, upload, or certification.

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 (Government Code Sections 6250-6276.48). As such, any materials provided are subject to disclosure 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, social security 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.

Project Overview

V1 1/30/23

HCD APP#: AHSC0001030

Project Area Type Transit Oriented Development (TOD)

Housing Type Rental

Geographic Area San Francisco Bay Area

"Optional Answer" will not affect application review or ranking. Applicant(s) or Joint Venture Entity meets CDLAC Definition of BIPOC Organization? per CDLAC 523(f)(1)(B), TCAC 10327(c)(2)(E)?

No

Select Yes to all that apply

Affordable Housing Development (AHD)	Yes
Housing Related Infrastructure (HRI)	No
Sustainable Transportation Infrastructure (STI)	Yes
Transportation-Related Amenities (TRA)	Yes
Program Costs (PGM)	Yes

Project / Program	TDC	AHSC Funds Requested	%	Total Non-AHSC Funding Commitments
AHD	\$158,677,715	\$33,000,000	72.18%	\$125,677,715
HRI	\$0	\$0	0.00%	
STI	\$17,494,365	\$10,217,503	22.35%	\$7,276,862
TRA	\$1,702,500	\$1,500,000	3.28%	\$202,500
PGM	\$1,003,896	\$1,003,896	2.20%	\$0
AHD & HRI Total	\$158,677,715	\$33,000,000	72.18%	\$125,677,715
Grand Total	\$178,878,476	\$45,721,399	100.00%	\$133,157,077

Was Project awarded funds in prior AHSC rounds? No

Is Project a phase of a previously awarded project? No

Select Metropolitan Planning Org. or "non-MPO area" Metropolitan Transportation Commission (MTC)

Affordable Housing Development (AHD)

Project Name: Balboa Building A (Balboa Gateway) Address: 11 Frida Kahlo Way

City: San Francisco Zip Code: 94112 County: San Francisco Latitude: 37.72395214 Longitude: -122.4515383

Census Tracts: 6075031100

APNs: 3180-201 190, BLOCK 3180 (POR) 3180-002

Description (include: descriptive information such as on-site resident or community amenities, climate adaptive features, and resources in the immediate vicinity)

The Balboa Reservoir Building A project is a once in a generation opportunity to redevelop underutilized parking lots in a heavily amenitized High Resource Area into 159 units of mixed income housing that are part of a buildout of roughly 1,100 new units total in the Balboa Reservoir master plan project The AHSC project includes the construction of the interior bicycle and pedestrian infrastructure on campus, as well as a linear park along the southern edge of the project that connects to a nearby transit plaza.

Sustainable Transportation Infrastructure (STI)

STI Project #1 Type of Project Transit or EV

Project Name: Purchase of 2 BART Rail Cars Address: Alameda, Contra Costa, San Francisco, and Santa Clara counties

City: San Francisco Zip Code: 94112 County: San Francisco Latitude: 37.72395214 Longitude: -122.4515383

Census Tracts: 6075031100

APNs: 190, BLOCK 3180 (POR) 3180-201 3180-002

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.)

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. □

STI Project #2? Yes

Type of Project Transit or EV

Project Name: 29 Sunset Phase II Address: 11 Frida Kahlo Way

City: San Francisco Zip Code: 94112 County: San Francisco Latitude: 37.72395214 Longitude: -122.4515383

Census Tracts: 6075031100

APNs: 190, BLOCK 3180 (POR) 3180-201 3180-002

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.)

The San Francisco Municipal Transportation Agency (SFMTA) 29 Sunset Improvement Project aims to improve the performance of and passenger experience on the Muni 29 Sunset bus route. The 29 Sunset Improvement Project is part of the SFMTA's Muni Forward program, which is focused on reducing delays on major Muni routes. Phase Two of the project includes the segment east of Junipero Serra. Proposed improvements consist of the following: removal of some stops; relocation of other stops; improvements of amenities at some stops; and implementation of transit signal priority (TSP) at intersections for over one lane-mile. Stop removal and relocation and TSP implementation would serve to reduce delays, thus reducing travel times and improving schedule reliability or on-time performance. Passenger experience will be improved through safer access to the bus stops achieved with improved visibility at intersections and shorter crosswalk distances.

Project Overview

V1 1/30/23

STI Project #3?	Yes								
Type of Project	Combination								
Project Name:	Bridge Housing Corporation - On Site Bike/Ped	Address:	11 Frida Kahlo Way						
City:	San Francisco	Zip Code:	94112	County:	San Francisco	Latitude:	37.72395214	Longitude:	-122.4515383
Census Tracts:	6075031100								
APNs	190, BLOCK 3180 (POR)	3180-201	3180-002						
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.)									
1 Miles of Class III -B Context Sensitive Bikeway with traffic calming features such as speed humps and way finding, over 2500 continous feet of new Safe & Accessible Sidewalk. This is fully contained within the Balboa Reservoir master planned project, which BRIDGE Housing Corporaton is the master developer.									
Quantity of new or repaired STI facilities funded by AHSC									
# of Transit Routes Improved	5	Crosswalks	10	\$100,000	ADA Curb Ramps		Overcrossings / Undercrossing		
Transit Vehicles	2	\$5,034,634	Transit Operations		Bikeshare infrastructure & operations				
EV Carshare infrastructure & operations			Other (Pedestrian Bulb Outs-9)	\$1,125,000	Other (Crosswalks-10)		\$100,000		

Transportation-Related Amenities (TRA)

TRA Project #1	Select the primary transit mode supported by this TRA	Local bus rapid transit							
Project Name:	29 Sunset - Transit Related Amenities	Address:	11 Frida Kahlo Way						
City:	San Francisco	Zip Code:	94112	County:	San Francisco	Latitude:	37.72395214	Longitude:	-122.4515383
Census Tracts:	6075031100								
APNs	190, BLOCK 3180 (POR)	3180-201	3180-002						
Description (include the general location and description of each TRA improvement)									
The 29 Sunset Phase II project will include the installation of at least four new bus bulbouts to enhance the safety and convenience of riders. All of these bulbouts will be at transit stops, thus meeting the "at or along a block-face" requirement for TRA points.									
TRA Project #2?	No								
TRA Project #3?	No								
Quantity of new or repaired TRA facilities funded by AHSC									
Bus Bulb-Outs	10	\$1,150,000	Street lights		Street trees or plantings		Bus Shelters		
Bicycle Parking At Transit			Bus Stop Benches						
Amount of TRA funds along block face(s) that include a Transit Station or Stop		\$1,500,000							

Program Costs (PGM)

Program Name:	AHD Resident Support	Address:	11 Frida Kahlo Way				
City:	San Francisco	Zip Code:	94112	County:	San Francisco	Proposed program type	AHD resident support
Program Description							
In addition to the basic resident services offered to AHD residents, this program will provide instructor-led adult education, health and wellness, or skill building classes. This includes, but is not limited to: Financial literacy, computer training, home-buyer education, GED classes, and resume building classes, ESL, nutrition class, exercise class, health information/awareness, art class, parenting class, on-site food cultivation and preparation classes, and smoking cessation classes. Excludes: Drop-in computer labs, monitoring or technical assistance.							
Who are the targeted users for the Program							
The targeted users are residents of the AHD. The programming will occur at the AHD project, typically in the community room and/or courtyard.							
What is the issue or need that the Program is attempting to address, and how will it successfully address this issue or need?							
The PGM hosts classes onsite at the AHD specifically to break down some of the barriers preventing low-income residents from attending these courses: on site classes mean no transportation/transit scheduling, no child care issues, and no costs. These three reasons are each on their own enough to discourage low-income residents from taking courses that may improve their quality of life; combined, they are a formidable barrier. Onsite in-person classes break down this barrier and give the AHD resident the option to better their lives.							
Describe additional design challenges and development costs incurred to meet the requirements of the Program.							
No challenges were encountered in identifying this PGM scope.							

Project Overview

V1 1/30/23

PGM #2?	Yes				
Program Name:	Transit Passes for Residents			Address:	11 Frida Kahlo Way
City:	San Francisco	Zip Code:	94112	County:	San Francisco
Program Description				Proposed program type	Transportation encouragement and safety
Each of the restricted units will be provided with one (1) free transit pass 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.					
Who are the targeted users for the Program					
The targeted users are the residents of the AHD. To encourage transit ridership, the free passes will remove financial barriers to utilizing transit options in the Project Area.					
What is the issue or need that the Program is attempting to address, and how will it successfully address this issue or need?					
High quality transit is expensive for hourly workers. The annual cost of a transit pass for AHD residents at this community is \$1,176. This burden will be eased for the first three years of the project, allowing new transit patterns to be formed, savings to be built, and jobs to stabilize.					
Describe additional design challenges and development costs incurred to meet the requirements of the Program.					
Not applicable					

PGM #3?	Yes				
Program Name:	Anti-Displacement			Address:	11 Frida Kahlo Way
City:	San Francisco	Zip Code:	94112	County:	San Francisco
Program Description				Proposed program type	Anti-displacement activities
Eviction Defense Collaborative (EDC) supports tenants struggling with rent increases, evictions, housing discrimination and landlord harassment by providing them with free legal representation when they cannot afford to pay for an attorney. For 27 years, EDC has been the only agency in San Francisco (SF) solely dedicated to eviction prevention, processing 99% of all the eviction notices filed in the city. EDC's wraparound service model includes legal services for eviction defense, rapid emergency rental assistance and subsidies for those at risk of eviction and displacement, and advocacy for unhoused San Franciscans facing eviction from City shelters. Since 2019, EDC has served as the lead partner with the City of San Francisco for the implementation of SF Tenant Right to Counsel (TRC), which guarantees all San Francisco tenants full scope legal representation in an eviction matter. In this role, EDC coordinates and oversees the work of 9 legal service organizations comprising the city-wide TRC system.					
Who are the targeted users for the Program					
EDC primarily serves low income BIPOC tenants and City shelter residents. In FY 21-22 EDC served 1722 unduplicated clients served of whom 84% were BIPOC; 48% were people with disabilities; 84% live at two times below the poverty level: \$27,180 for a single member household; 18% were seniors; 14.4 % self identified as LGBTQIA+ and 3.7% as Trans/Non binary.					
What is the issue or need that the Program is attempting to address, and how will it successfully address this issue or need?					
San Francisco's longstanding housing crisis is one of the most dire nationwide. Housing costs for San Francisco residents are among the highest in the world. Similar-size cities such as Seattle, Denver and Austin, Texas, have approved construction for three to four times as many residential units as San Francisco since 2015, according to U.S. census building permit data. From 2015 to 2021, the city permitted 24,600 units to be built, a little over 3,500 units annually. A review of six years worth of building permit data for 15 cities with populations between 600,000 and 1.1 million people found that San Francisco ranked in the bottom half. The crisis is formed by multiple factors including: the critical lack of affordable housing, ever					
Describe additional design challenges and development costs incurred to meet the requirements of the Program.					
None					

PGM #4?	Yes				
Program Name:	Workforce Development - Grid Alternatives			Address:	11 Frida Kahlo Way
City:	San Francisco	Zip Code:	94112	County:	San Francisco
Program Description				Proposed program type	Workforce Development
As a workforce partner in the AHSC Balboa Reservoir Project, 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. 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					
We have a focus on creating equitable career pathways for those underrepresented in renewable energy: women, people of color, indigenous tribal members, and formerly incarcerated individuals. To date, GRID has provided training for over 32,000 people across the country, and 65% of participants have self-identified as people of color.					
What is the issue or need that the Program is attempting to address, and how will it successfully address this issue or need?					
Solar installer is a well paying career path, but low income minority workers are underrepresented in this field. Grid Alternatives provides training for this target population and also the wraparound services to improve job retention and advancement.					
Describe additional design challenges and development costs incurred to meet the requirements of the Program.					
None					

PGM #5?	AHSC R6No				
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Project Overview

V1 1/30/23

PGM #6? ☐ No Use this "PGM #6" only for "OTHER" if your proposed program does not fall within the **program types listed in guidelines**.

Program Costs in Project(s) include ☐ Expansion of existing programs to serve new populations or offer new program service and implementation

Has the Applicant(s) applied, plan to apply, or been awarded other HCD program funds for this proposed Project?

Yes

If applicable, provide other Project name(s) for which this Project has applied for HCD funds in the past.

Balboa Reservoir (QIA)		Balboa Building A within the QIA					
Negative points may be assessed if applicant fails to disclose all past awards, simultaneous applications, and known future applications.							
HCD program(s) name(s):	21-06	Plan to apply?	Loan amount	Grant amount	Awarded?	Award date or expected Award date?	HCD Contract Number
IIG QIA	Yes	Yes		\$26,000,000	Yes	12/2/2021	21-IIG-16857

NOFA Section II (C)(2)

Applicant(s) acknowledges that a single Developer may receive no more than \$100 million per NOFA funding cycle. This limitation may be waived by SGC if necessary, to meet statutory requirements referenced in Guidelines §108.

Yes

Utilizing Tax Credits?	4%	
Federal	Yes	Proposed equity investor contribution (\$)
State	Yes	Proposed equity investor contribution (\$)
		Anticipated tax credit factor
		Anticipated tax credit factor
Timeframe for applying for 4% Tax Credits	Proposed month	September
	Proposed year	2024
	Tax Credit Reservation Awarded?	No
Is the Project a scattered site housing Project? UMR §8303(b)	No	
Total Units	LIHTC Units	Project Site Area
159	157	1.10 Acres
Units per Acre	Age Restrictions	Special Facility Type
0 Per Acre	None	N/A
Tenure Type	Rental Subsidy?	Commercial Space?
Permanent	No	No
Relocation Required?		No
Operating Subsidy?	No	HUD 811 Project?
	No	Any type of demolition required?
	No	
Number of buildings?	1	Total building(s) stories?
	6	Number of elevators?
	2	Total Homeownership square Feet?
	0	
Total Commercial square feet?	0	Total Residential Rental square feet?
	172,910	Total Residential Non-rental square feet?
	0	
For <u>Operating Subsidies</u> : Provide evidence of commitment status (e.g., letters of intent, commitment letters, grant awards or subsidy contracts). If commitments are not available, provide 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).		
For <u>Project-Based Rental Assistance</u> : Projects having or proposing project-based rental assistance must provide documentation of current contract Rents. A fully executed subsidy contract shall be required prior loan closing. Projects having or proposing project-based rental assistance shall fund a Transition Reserve in accordance with MHP §7312(f)(2).		
File Name:	Operating Subsidy Commitment	Documentation evidencing commitment of Operating Subsidies including source, term (in years), total subsidy amount, and estimated first year allocation.
		Uploaded to HCD?
		N/A
File Name:	Current Contract Rents	Projects proposing project-based rental assistance: Provide documentation of current contract rents for HAP, Shelter Plus or other source, as applicable.
		Uploaded to HCD?
		N/A

§105 Eligible Applicants

(a) Applicant(s) acknowledges and understand the requirement of "Eligible Applicants"

Yes

(1) Eligible applicant entities shall include any of the following:

A Locality, public housing authority, redevelopment successor agency, transit agency or transit operator, Regional Transportation Planning Agency (RTPA).

(A) 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 Tribal Entity whose Project meets requirements listed in detail in Appendix B.

Is Project being proposed by a **Tribal Entity** and meets requirements listed in detail in Appendix B?

No

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

(2) special purpose entity ultimate borrower meeting the requirements of UMR §8313.2 may be listed on the AHSC Program application in the appropriate, designated fields for listing such a borrower entity.

Single purpose entities not meeting the requirements of a special purpose entity pursuant to UMR §8313.2, whether serving as an intermediate entity within

(A) the ultimate borrower structure or not, are not Eligible Applicants. Such single purpose entities will not be included as a separate party on any AHSC Program legal documents, including but not limited to, Standard Agreements, nor are they eligible to be Recipients or payees of AHSC Program funds.

(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.

Will a Public Agency have a real property interest in the proposed Project?

Yes

Will the Application include the Public Agency as a joint applicant?

No

File Name	STI-TRA Agreement	STI-TRA agreement: If utilizing the experience of a Locality or Transportation Agency non-applicant for STI or TRA components an applicant must 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.	Uploaded to HCD?	Yes
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- (4) All eligible Applicants appearing on the application for the Project will be held jointly and severally liable for the completion of the Project and as such, will each sign all Standard Agreements to the award of AHSC funds.
- 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,
- (A) Recipients may indemnify each other by entering into agreements with one another as to individual Capital Projects. 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.

"Developer" means the entity that the Department and the Council rely upon for experience, site control, and capacity, and which controls (1) the Affordable Housing Development during development and through occupancy or the Housing Related Infrastructure during development and through completion, (2) the Sustainable Transportation Infrastructure during development and through operation, or (3) the Transit-Related Amenities during development and through Operation.

Applicant #1	Entity name	BRIDGE Housing Corporation			
Eligible applicant type	Developer	Organization type	Non-profit Public Benefit Corporation		
File Name	App1 Cert & Legal Disclosure	Reference: Applicant Certification Worksheet.			Uploaded to HCD? Yes
File Name	App1 OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.			Uploaded to HCD? Yes
File Name	App1 Org Chart	Applicant Organization Chart.			Uploaded to HCD? Yes
File Name	App1 Signature Block	Signature Block - upload in Microsoft Word Document.			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 FTB for Corporations (Non-Profits Only).			Uploaded to HCD? Yes

Applicant #2	Entity name	Mayors Office of Housing and Community Development (City & County of San Francisco)			
Eligible applicant type	Locality	Organization type	Public Agency		
File Name	App2 Cert & Legal Disclosure	Reference: Applicant Certification Worksheet.			Uploaded to HCD? Yes
File Name	App2 OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.			Uploaded to HCD? N/A
File Name	App2 Org Chart	Applicant Organization Chart.			Uploaded to HCD? N/A
File Name	App2 Signature Block	Signature Block - upload in Microsoft Word Document.			Uploaded to HCD? Yes
File Name	App2 Cert of Good Standing	Dated 30 days or less from the application due date.			Uploaded to HCD? N/A
File Name	App2 Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).			Uploaded to HCD? N/A

Applicant #3	Entity name	N/A			
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Applicant #4	Entity name	N/A			
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Owner/Borrower	Entity name	Balboa Gateway LP			
File Name	Owner Cert & Legal Disclosure	Reference: Applicant Certification Worksheet.			Uploaded to HCD? Yes
File Name	Owner OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.			Uploaded to HCD? Yes
File Name	Owner Org Chart	Owner Organization Chart.			Uploaded to HCD? Yes
File Name	Owner Signature Block	Signature Block - upload in Microsoft Word Document.			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 FTB for Corporations (Non-Profits Only).			Uploaded to HCD? N/A

Managing General Partner	Entity name	Balboa Gateway LLC			
File Name	MGP Cert & Legal	Reference: Applicant Certification Worksheet.			Uploaded to HCD? Yes
File Name	MGP OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.			Uploaded to HCD? Yes
File Name	MGP Org Chart	MGP Organization Chart.			Uploaded to HCD? Yes
File Name	MGP Signature Block	Signature Block - upload in Microsoft Word Document.			Uploaded to HCD? Yes
File Name	MGP Cert of Good Standing	Dated 30 days or less from the application due date.			Uploaded to HCD? Yes
File Name	MGP Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).			Uploaded to HCD? N/A

Administrative General Partner #1	Entity name	NA			
File Name	AGP1 Cert & Legal	Reference: Applicant Certification Worksheet.			Uploaded to HCD?
File Name	AGP1 OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.			Uploaded to HCD?
File Name	AGP1 Org Chart	AGP Organization Chart.			Uploaded to HCD?
File Name	AGP1 Signature Block	Signature Block - upload in Microsoft Word Document.			Uploaded to HCD?
File Name	AGP1 Cert of Good Standing	Dated 30 days or less from the application due date.			Uploaded to HCD?
File Name	AGP1 Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).			Uploaded to HCD?

Administrative General Partner #2	Entity name	N/A			
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Development Team Contacts and Legislative Information

Contact Type	Entity Legal Name	Eligible Sponsor Type	Organization Type	Address	City	State	Zip Code	Auth Rep Name	Title	Email	Phone #	Contact Name	Title	Email	Phone #	Contact Address	City	State	Zip Code
Applicant #1	BRIDGE Housing Corporation	Developer	Non-profit Public Benefit Corporation	600 California St #900, San Francisco, CA 94108, USA	San Francisco	CA	94018	Smitha Seshadri	Executive Vice President	sseshadri@bridgehousing.com	415-989-1111	Jeremy Hoffman	Director of Development	jhoffman@bridgehousing.com	(510) 501-4529	600 California St #900	San Francisco	CA	94108
Applicant #2	Mayors Office of Housing and Community Development (City & County of San Francisco)	Locality	Public Agency	1 South Van Ness Avenue, 5th Floor	San Francisco	CA	94103	Sara Amaral	Director of Housing Development	sara.amaral@sfgov.org	(628) 652-5808	Robert Baca	Director	robert.baca@sfgov.org	415-701-5500	1 South Van Ness Avenue, 5th Floor	San Francisco	CA	94103
Owner / Borrower Entity	Balboa Gateway LP	Developer	Limited Partnership	600 California St #900	San Francisco	CA	94018	Smitha Seshadri	Executive Vice President	bwiblin@bridgehousing.com	415-321-3565	Jeremy Hoffman	Director of Development	jhoffman@bridgehousing.com	(510) 501-4529	600 California St #900	San Francisco	CA	94108
Managing General Partner	NA	Developer	Limited Liability Company	600 California St #900	San Francisco	CA	94018	Smitha Seshadri	Executive Vice President	bwiblin@bridgehousing.com	415-321-3565	Jeremy Hoffman	Director of Development	jhoffman@bridgehousing.com	(510) 501-4529	600 California St #900	San Francisco	CA	94108
Administrative GP #1	NA																		
Transit Agency Partner (applicable to STI and TRA components)	San Francisco Bay Area Rapid Transit District (BART)			2150 Webster Street, 9th Floor	Oakland	CA	94612					Shannon Dodge	Principal Property Development Officer	sdodge@bart.gov	(510) 359-6978				
Property Management Agent	Bridge Property Management Company, Inc.			600 California St #900	San Francisco	CA	94018					Jeremy Hoffman	Director of Development	jhoffman@bridgehousing.com	(510) 501-4529				
Financial Consultant	California Housing Partnership			369 Pine Street, Suite 300	San Francisco	CA	94104					Chad Horsford	Senior Housing Finance Consultant	chorsford@chpc.net	(424) 294-8483				
Lead (primary) Service Provider	TBD																		
Borrower Legal Counsel	Lubin Olson & Niewiadomski LLP			600 Montgomery Street, 14th Floor	San Francisco	CA	94111					Beth Anderson	Partner	BAnderson@lubinolson.com	(415) 981-0550				
General Contractor	Cahill Contractors LLC			425 California Street, Suite 2200	San Francisco	CA	94104					Matt Irwin	Vice President	mirwin@cahill-sf.com	(415) 986-0600				
Architect	BAR Architects & Interiors			77 Geary St Suite 200	San Francisco	CA	94108					Patricia Centeno	Principal	pcenteno@bararch.com	415 293 7180				
Other (Specify)																			
Other (Specify)																			
Other (Specify)																			
Other (Specify)																			

Congress person Name(s)	District #	State Senator Name(s)	District #	State Assembly Member Name(s)	District #
Nancy Pelosi	11	Scott D. Wiener	11	Philip Y. Ting	19

Balboa Building A (Balboa Gateway) Sustainable Transportation Infrastructure (STI) Sources and Uses Budget App AHSC0001030

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	Population Based General Fund	Transit Performance Initiative	Valley Transportation Authority (VTA)	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	
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	
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	
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	
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	

Balboa Building A (Balboa Gateway) Sustainable Transportation Infrastructure (STI) Sources and Uses Budget App AHSC0001030

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	Population Based General Fund	Transit Performance Initiative	Valley Transportation Authority (VTA)	0	0	0	Sources Total	
Other Transit and Station Areas (Specify)								\$0	
Other Transit and Station Areas (Specify)								\$0	
Total Transit and Station Areas - Construction	\$5,034,634	\$0	\$0	\$1,633,754	\$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	
Provide Name of Impact Fee (Specify)								\$0	
Provide Name of Impact Fee (Specify)								\$0	
Total Impact Fees	\$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	
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	
Purchase of 2 BART Rail Cars Total Budgeted Project Costs	\$5,034,634	\$0	\$0	\$1,633,754	\$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 - 29 Sunset Phase II

Environmental review/studies		\$355,000						\$355,000	
Plan Specification and Estimates		\$850,000						\$850,000	
Right of way support costs								\$0	
Site or right of way acquisition for Cap. Improvement Project								\$0	
Other Soft Costs (Construction Management)		\$121,608	\$2,084,000					\$2,205,608	
Other Soft Costs (Contingency)		\$1,347,500						\$1,347,500	
Other Soft Costs (Specify)								\$0	
Other Soft Costs (Specify)								\$0	
Total Soft Costs	\$0	\$2,674,108	\$2,084,000	\$0	\$0	\$0	\$0	\$4,758,108	
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	
Sanitary Sewer								\$0	
Irrigation								\$0	
Storm Drain								\$0	
Retention Basin/Culverts								\$0	

Balboa Building A (Balboa Gateway) Sustainable Transportation Infrastructure (STI) Sources and Uses Budget App AHSC0001030

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	Population Based General Fund	Transit Performance Initiative	Valley Transportation Authority (VTA)	0	0	0	Sources Total	
Other Site Utilities (Specify)								\$0	
Total Site Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Aggregate Base								\$0	
Asphalt Pavement								\$0	
Sidewalk, Curb and Gutter	\$250,000		\$875,000					\$1,125,000	
Street Lights								\$0	
Striping/Barricades (Bicycle Facilities)								\$0	
Signage								\$0	
Crossing and Traffic Signals	\$100,000							\$100,000	
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	\$350,000	\$0	\$875,000	\$0	\$0	\$0	\$0	\$1,225,000	
Striping/Barricades (for dedicated bus lanes)								\$0	
Sidewalk, Curb and Gutter								\$0	
Street Lights								\$0	
Signage								\$0	
Signaling Prioritization Technology	\$400,000	\$10,000						\$410,000	
Boarding infrastructure	\$1,750,000							\$1,750,000	
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	\$2,150,000	\$10,000	\$0	\$0	\$0	\$0	\$0	\$2,160,000	
Urban Greening (Specify)								\$0	
Urban Greening (Specify)								\$0	
Urban Greening (Specify)								\$0	
Total Urban Greening	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Provide Name of Impact Fee (Specify)								\$0	
Provide Name of Impact Fee (Specify)								\$0	
Total Impact Fees	\$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	
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	
Total STI #2 Budgeted Project Costs	\$2,500,000	\$2,684,108	\$2,959,000	\$0	\$0	\$0	\$0	\$8,143,108	

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.

Balboa Building A (Balboa Gateway) Sustainable Transportation Infrastructure (STI) Sources and Uses Budget App AHSC0001030

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	Population Based General Fund	Transit Performance Initiative	Valley Transportation Authority (VTA)	0	0	0	Sources Total	

STI BUDGET #3 - Bridge Housing Corporation - On Site Bike/Ped

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	
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	
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	
Aggregate Base								\$0	
Asphalt Pavement	\$50,000							\$50,000	
Sidewalk, Curb and Gutter	\$2,307,869							\$2,307,869	
Street Lights								\$0	
Striping/Barricades (Bicycle Facilities)								\$0	
Signage	\$50,000							\$50,000	
Crossing and Traffic Signals								\$0	
Roundabouts, median islands or curb extensions								\$0	
Other traffic calming surface improvements	\$75,000							\$75,000	
Other Complete Street Improvements (Specify)								\$0	
Other Complete Street Improvements (Specify)								\$0	
Total Complete Streets Improvements - Construction	\$2,482,869	\$0	\$0	\$0	\$0	\$0	\$0	\$2,482,869	
Striping/Barricades (for dedicated bus lanes)								\$0	
Sidewalk, Curb and Gutter								\$0	
Street Lights								\$0	
Signage								\$0	
Signaling Prioritization Technology								\$0	
Queueing Infrastructure								\$0	

Balboa Building A (Balboa Gateway) Sustainable Transportation Infrastructure (STI) Sources and Uses Budget App AHSC0001030

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	Population Based General Fund	Transit Performance Initiative	Valley Transportation Authority (VTA)	0	0	0	Sources Total	
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	
Urban Greening (Specify) tree planting, top soil, irrigation	\$200,000							\$200,000	
Urban Greening (Specify)								\$0	
Urban Greening (Specify)								\$0	
Total Urban Greening	\$200,000	\$0	\$0	\$0	\$0	\$0	\$0	\$200,000	
Provide Name of Impact Fee (Specify)								\$0	
Provide Name of Impact Fee (Specify)								\$0	
Total Impact Fees	\$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	
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	
Total STI #3 Budgeted Project Costs	\$2,682,869	\$0	\$0	\$0	\$0	\$0	\$0	\$2,682,869	

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	\$2,674,108	\$2,084,000	\$0	\$0	\$0	\$0	\$4,758,108	
Total Site Preparation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Site Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Complete Streets Improvements - Construction	\$2,832,869	\$0	\$875,000	\$0	\$0	\$0	\$0	\$3,707,869	
Total Transit and Station Areas - Construction	\$7,184,634	\$10,000	\$0	\$1,633,754	\$0	\$0	\$0	\$8,828,388	
Total Urban Greening	\$200,000	\$0	\$0	\$0	\$0	\$0	\$0	\$200,000	
Total Impact Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Activity Delivery Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Other Capital Asset Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total STI Budgeted Project Costs	\$10,217,503	\$2,684,108	\$2,959,000	\$1,633,754	\$0	\$0	\$0	\$17,494,365	

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Balboa Building A (Balboa Gateway) Transportation Related Amenities (TRA) Sources and Uses Budget App AHSC0001030

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	Prop B General Fund Transfer	0	0	0	0	0		

TRA BUDGET #1 - 29 Sunset - Transit Related Amenities

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	
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	
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	
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	
Striping/Barricades (for dedicated bus lanes)								\$0	
Sidewalk, Curb, and Gutter								\$0	
Street Lights								\$0	
Signage		\$150,000						\$150,000	
Signaling Prioritization Technology								\$0	
Boarding infrastructure	\$1,500,000							\$1,500,000	
Seating/Benches								\$0	
Bus/Transit Shelters								\$0	
Other ITS Technology								\$0	
Other Transit Station or Stop (Move/Expand Bus Stops)		\$52,500						\$52,500	
Other Transit Station or Stop (Specify)								\$0	

Balboa Building A (Balboa Gateway) Transportation Related Amenities (TRA) Sources and Uses Budget App AHSC0001030

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	Prop B General Fund Transfer	0	0	0	0	0	Sources Total	
Total Transit Station or Stop - Construction	\$1,500,000	\$202,500	\$0	\$0	\$0	\$0	\$0	\$1,702,500	
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	
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	
Provide Name of Impact Fee (Specify)								\$0	
Provide Name of Impact Fee (Specify)								\$0	
Total Impact Fees	\$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	
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	
29 Sunset - Transit Related Amenities Total Budgeted Project Costs	\$1,500,000	\$202,500	\$0	\$0	\$0	\$0	\$0	\$1,702,500	

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	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Site Preparation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Site Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Complete Streets Improvements - Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Transit Station or Stop - Construction	\$1,500,000	\$202,500	\$0	\$0	\$0	\$0	\$0	\$1,702,500	
Total Urban Greening	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Amenities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Impact Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Activity Delivery Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Other Capital Asset Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total TRA Budgeted Project Costs	\$1,500,000	\$202,500	\$0	\$0	\$0	\$0	\$0	\$1,702,500	

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								Comments
	AHSC PGM Grant	0	0	0	0	0	0	Sources Total	

PGM BUDGET #1 - AHD Resident Support

Direct Staff Cost (Instructor Led Classea and Activities)	\$114,500							\$114,500	
Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	
Total Direct Staff Costs	\$114,500	\$0	\$0	\$0	\$0	\$0	\$0	\$114,500	
Other Indirect Staff Cost (Overhead Staff Costs)	\$22,500							\$22,500	
Other Indirect Staff Cost (Specify)								\$0	
Other Indirect Staff Cost (Specify)								\$0	
Total Indirect Staff Costs	\$22,500	\$0	\$0	\$0	\$0	\$0	\$0	\$22,500	
Total Staff Costs	\$137,000	\$0	\$0	\$0	\$0	\$0	\$0	\$137,000	
Travel								\$0	
Equipment	\$4,000							\$4,000	
Required Transit Passes/Cards (see cell comment)								\$0	
Other Transit Passes								\$0	
Supplies (Training materials and equipment)	\$9,000							\$9,000	
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	\$13,000	\$0	\$0	\$0	\$0	\$0	\$0	\$13,000	
AHD Resident Support Total Budgeted Project Costs	\$150,000	\$0	\$0	\$0	\$0	\$0	\$0	\$150,000	

PGM BUDGET #2 - Transit Passes for Residents

Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	
Total Direct Staff Costs	\$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	
Total Staff Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Travel								\$0	
Equipment								\$0	
Required Transit Passes/Cards (see cell comment)	\$553,896							\$553,896	
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	\$553,896	\$0	\$0	\$0	\$0	\$0	\$0	\$553,896	
Transit Passes for Residents Total Budgeted Project Costs	\$553,896	\$0	\$0	\$0	\$0	\$0	\$0	\$553,896	

PGM BUDGET #3 - Anti-Displacement

Direct Staff Cost (Staff)	\$150,000							\$150,000	
Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	
Total Direct Staff Costs	\$150,000	\$0	\$0	\$0	\$0	\$0	\$0	\$150,000	
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	
Total Staff Costs	\$150,000	\$0	\$0	\$0	\$0	\$0	\$0	\$150,000	
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 (Other Costs)								\$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	
Anti-Displacement Total Budgeted Project Costs	\$150,000	\$0	\$0	\$0	\$0	\$0	\$0	\$150,000	

PGM BUDGET #4 - Workforce Development - Grid Alternatives

Direct Staff Cost (solar training)	\$150,000							\$150,000	
Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	

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								Comments
	AHSC PGM Grant	0	0	0	0	0	0	Sources Total	
Direct Staff Cost (Specify)								\$0	
Direct Staff Cost (Specify)								\$0	
Total Direct Staff Costs	\$150,000	\$0	\$0	\$0	\$0	\$0	\$0	\$150,000	
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	
Total Staff Costs	\$150,000	\$0	\$0	\$0	\$0	\$0	\$0	\$150,000	
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	
Other Capital Costs (Specify)								\$0	
Total Other Capital Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Workforce Development - Grid Alternatives Total Budgeted Project Costs	\$150,000	\$0	\$0	\$0	\$0	\$0	\$0	\$150,000	

TOTAL PROGRAMS (PGM) BUDGET

Total Direct Staff Costs	\$414,500	\$0	\$0	\$0	\$0	\$0	\$0	\$414,500	
Total Indirect Staff Costs	\$22,500	\$0	\$0	\$0	\$0	\$0	\$0	\$22,500	
Total Other Capital Costs	\$566,896	\$0	\$0	\$0	\$0	\$0	\$0	\$566,896	
Total PGM Budgeted Project Costs	\$1,003,896	\$0	\$0	\$0	\$0	\$0	\$0	\$1,003,896	

End of Document

Unit Mix			RENTAL ONLY							HOMEOWNERSHIP ONLY								
# of Bdrms	Unit Type	% of Area Median Income	Total Units	Total Rental Units	Rental Un-Restricted Units	Total Restricted Units	AHSC Rental Affordable Restricted Units	AHSC Rental Assisted Units	Other Rental Restricted	Total Homeowner (HO) Units	Total (HO) Un-Restricted Units	Total (HO) Restricted Units	Total Affordable (HO) Units	AHSC (HO) Assisted Units	Other (HO) Restricted Units	Support Housing Units	Veterans Units	Senior Units
0	Rental	50%	3	3		3	3	2	1									
0	Rental	50%	7	7		7	7	7										
0	Rental	60%	7	7		7	7	7										
1	Rental	30%	12	12		12	12	6	6									
1	Rental	50%	13	13		13	13	13										
1	Rental	60%	21	21		21	21	21										
2	Rental	50%	14	14		14	14	7	7									
2	Rental	50%	10	10		10	10	10										
2	Rental	60%	29	29		29	29	29										
3	Rental	50%	11	11		11	11	6	5									
3	Rental	50%	8	8		8	8	8										
3	Rental	60%	21	21		21	21	21										
2	Rental Manager	1	1	1	1													
3	Rental Manager	1	1	1	1													
	Totals		159	159	2	157	157	138	19									

Will your Project receive an HCD loan award before the AHSC application due date?	No
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Unrestricted Manager: Funding Amount				\$400,000	AHD Funds Requested				\$33,000,000	Max allowable AHD				\$33,000,000							
		0 Bedroom Units				1 Bedroom Units				2 Bedroom Units				3 Bedroom Units				4+ Bedroom Units			
AMI	Per Unit Amount	AHSC Assisted Units	Other Rental Restrictors	Funding Amount	Per Unit Amount	AHSC Assisted Units	Other Rental Restrictors	Funding Amount	Per Unit Amount	AHSC Assisted Units	Other Rental Restrictors	Funding Amount	Per Unit Amount	AHSC Assisted Units	Other Rental Restrictors	Funding Amount	Per Unit Amount	AHSC Assisted Units	Other Rental Restrictors	Funding Amount	
60%	\$200,000	7	*****	\$200,000	21	\$200,000	21	\$4,200,000	\$200,000	29	*****	\$200,000	21	*****	*****	*****	*****	*****	*****	*****	
55%	\$223,480	7	*****	\$223,480	21	\$223,480	21	\$4,693,080	\$223,480	29	*****	\$223,480	21	*****	*****	*****	*****	*****	*****	*****	
50%	\$246,959	7	*****	\$246,959	21	\$246,959	21	\$5,185,139	\$246,959	29	*****	\$246,959	21	*****	*****	*****	*****	*****	*****	*****	
45%	\$270,439	7	*****	\$270,439	21	\$270,439	21	\$5,677,219	\$270,439	29	*****	\$270,439	21	*****	*****	*****	*****	*****	*****	*****	
40%	\$293,919	7	*****	\$293,919	21	\$293,919	21	\$6,169,309	\$293,919	29	*****	\$293,919	21	*****	*****	*****	*****	*****	*****	*****	
35%	\$317,393	7	*****	\$317,393	21	\$317,393	21	\$6,661,393	\$317,393	29	*****	\$317,393	21	*****	*****	*****	*****	*****	*****	*****	
30%	\$341,022	2	1	*****	\$341,022	6	6	\$4,212,267	\$341,022	7	7	*****	\$341,022	6	5	*****	\$341,022	6	5	*****	
25%	\$364,502	2	1	*****	\$364,502	6	6	\$4,574,022	\$364,502	7	7	*****	\$364,502	6	5	*****	\$364,502	6	5	*****	
20%	\$387,982	2	1	*****	\$387,982	6	6	\$4,935,777	\$387,982	7	7	*****	\$387,982	6	5	*****	\$387,982	6	5	*****	
15%	\$411,461	2	1	*****	\$411,461	6	6	\$5,297,532	\$411,461	7	7	*****	\$411,461	6	5	*****	\$411,461	6	5	*****	
Totals	Total	16	1	*****	Total	40	6	\$11,666,810	Total	46	7	*****	Total	36	5	*****	Total	0	0	\$0	

Total Development Cost	#####
Less: Net Syndication Proceeds/Investor Equity	\$76,202,278
Less: Additional Owner/General Partner Equity (Including Deferred Developer Fee)	\$16,646,318
Total Estimated Financing needed	\$65,829,119
Less: Supportable Conventional or Bond Debt Financing	\$13,107,000
Less: "Soft" Financing and Grants	\$19,722,119
Permanent Funding Gap	\$33,000,000

MHP § 7304(c)	Average gross square feet of Restricted Units	*****
	Average gross square feet of all residential units	*****
	Restricted Units average gross square footage as a % of total residential units average gross square footage	*****
	Shared Cost Calculation Amount	*****

county, name	1m02_1p1	1m02_1p2	1m02_2p1	1m02_2p2	1m02_2p3	1m02_2p4	1m02_2p5	1m02_2p6	1m02_2p7	1m02_2p8
Alameda	\$27,900	\$57,150	\$64,300	\$47,400	\$77,150	\$82,850	\$88,550	\$89,250	\$94,200	\$94,200
Albany	\$36,150	\$36,150	\$40,000	\$40,000	\$42,000	\$42,000	\$45,000	\$45,000	\$48,000	\$48,000
Alameda	\$30,350	\$34,650	\$39,000	\$43,300	\$47,600	\$50,000	\$52,350	\$52,350	\$57,200	\$57,200
Butte	\$27,300	\$31,200	\$35,100	\$38,950	\$42,800	\$45,200	\$45,200	\$48,000	\$51,400	\$51,400
Calaveras	\$37,500	\$36,000	\$40,500	\$43,000	\$46,000	\$52,200	\$55,600	\$55,600	\$59,400	\$59,400
Colusa	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,400		
Contra Costa	\$50,000	\$57,150	\$64,300	\$71,400	\$77,150	\$82,850	\$88,550	\$89,250	\$94,200	\$94,200
Del Norte	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
El Dorado	\$35,500	\$40,550	\$45,600	\$50,650	\$54,750	\$58,800	\$62,850	\$66,900		
Fresno	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Glenn	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Humboldt	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Imperial	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Inyo	\$28,950	\$33,100	\$37,250	\$41,350	\$44,700	\$48,000	\$51,300	\$54,600		
Kern	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Kings	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Lake	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Lassen	\$28,150	\$32,150	\$36,150	\$40,150	\$43,400	\$46,600	\$49,000	\$53,000		
Los Angeles	\$41,750	\$47,850	\$53,950	\$59,550	\$64,350	\$69,100	\$73,850	\$78,600	\$83,250	\$83,250
Madera	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Marin	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Mariposa	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Mendocino	\$28,150	\$32,150	\$36,150	\$40,150	\$43,400	\$46,600	\$49,000	\$53,000		
Merced	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Monterey	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450		
Muskegon	\$39,800	\$45,550	\$51,250	\$56,950	\$61,400	\$65,950	\$70,500	\$75,050		
Napa	\$34,150	\$50,450	\$56,750	\$63,050	\$68,100	\$73,150	\$78,200	\$83,250		
Nevada	\$44,550	\$44,550	\$44,550	\$44,550	\$44,550	\$44,550	\$44,550	\$44,550		
Orange	\$44,450	\$54,200	\$61,000	\$67,750	\$73,200	\$78,600	\$84,050	\$89,450		
Palm Springs	\$28,150	\$40,550	\$45,600	\$50,650	\$54,750	\$58,800	\$62,850	\$66,900		
Pasadena	\$28,950	\$33,100	\$37,250	\$41,350	\$44,700	\$48,000	\$51,300	\$54,600		
Piedmont	\$30,800	\$35,200	\$39,600	\$44,000	\$47,550	\$51,050	\$54,550	\$58,050		
Riverside	\$35,500	\$40,550	\$45,600	\$50,650	\$54,750	\$58,800	\$62,850	\$66,900		
San Bernardino	\$36,800	\$42,050	\$47,300	\$52,550	\$56,800	\$61,050	\$65,250	\$69,400		
San Diego	\$28,150	\$32,150	\$36,150	\$40,150	\$43,400	\$46,600	\$49,000	\$53,000		
San Francisco	\$45,550	\$55,550	\$58,550	\$55,550	\$70,300	\$75,500	\$80,700	\$85,900		

45% \$58,725 \$67,140 \$7

AHSC R6

[illegible]

40%	\$52,200	\$59,680	\$67,120	\$74,560	\$80,560	\$86,520	\$92,480	\$98,440
35%	\$45,675	\$52,220	\$58,730	\$65,240	\$70,400	\$75,705	\$80,820	\$86,135
30%	\$39,150	\$44,760	\$50,340	\$55,920	\$60,420	\$64,890	\$69,360	\$73,830
25%	\$32,625	\$37,300	\$41,950	\$46,600	\$50,350	\$54,075	\$57,800	\$61,525
20%	\$26,100	\$29,840	\$33,560	\$37,280	\$40,280	\$43,280	\$46,240	\$49,220
15%	\$19,575	\$22,380	\$25,170	\$27,960	\$30,210	\$32,445	\$34,680	\$36,915

CAHFA 50% Rent Limits
(Assumes 1 person in 0-bedroom, 2 people in a 1 bdrm and 1 additional person per additional bedroom)

Level	0 Bdrms.	1 Bdrms.	2 Bdrms.	3 Bdrms.	4 Bdrms.	5 Bdrms.
San Francisco	\$1,631	\$1,865	\$2,098	\$2,330	\$2,516	\$2,704

TCAC/CDLAC/AHSC Rent Limits
(Assumes 1 person in 0-bdrm unit, 1.5 people per bedroom in other units)

TCACrentTot						
Limit	0 Bdrms.	1 Bdrms.	2 Bdrms.	3 Bdrms.	4 Bdrms.	5 Bdrms.
San Francisco	\$3,915	\$4,195	\$5,034	\$5,817	\$6,489	\$7,159
San Francisco	\$3,586	\$3,845	\$4,614	\$5,332	\$5,948	\$6,562
San Francisco	\$3,250	\$3,496	\$4,195	\$4,847	\$5,407	\$5,966
San Francisco	\$3,099	\$3,321	\$3,985	\$4,605	\$5,137	\$5,687
San Francisco	\$2,936	\$3,146	\$3,775	\$4,362	\$4,866	\$5,369
San Francisco	\$2,773	\$2,971	\$3,565	\$4,120	\$4,596	\$5,071
San Francisco	\$2,610	\$2,797	\$3,356	\$3,876	\$4,326	\$4,773
San Francisco	\$2,446	\$2,622	\$3,146	\$3,635	\$4,055	\$4,474
San Francisco	\$2,283	\$2,447	\$2,936	\$3,383	\$3,785	\$4,176
San Francisco	\$2,120	\$2,272	\$2,726	\$3,150	\$3,514	\$3,878
San Francisco	\$1,957	\$2,097	\$2,517	\$2,868	\$3,244	\$3,579
San Francisco	\$1,794	\$1,922	\$2,307	\$2,668	\$2,974	\$3,291
San Francisco	\$1,631	\$1,748	\$2,097	\$2,423	\$2,703	\$2,983
San Francisco	\$1,468	\$1,573	\$1,887	\$2,181	\$2,433	\$2,684
San Francisco	\$1,305	\$1,398	\$1,678	\$1,939	\$2,163	\$2,386
San Francisco	\$1,141	\$1,223	\$1,468	\$1,694	\$1,892	\$2,088
San Francisco	\$978	\$1,048	\$1,258	\$1,454	\$1,622	\$1,789
San Francisco	\$815	\$874	\$1,048	\$1,211	\$1,351	\$1,491
San Francisco	\$652	\$699	\$839	\$969	\$1,081	\$1,193
San Francisco	\$489	\$524	\$629	\$727	\$811	\$894

San Francisco	\$65,250	\$74,600	\$83,900	\$93,200	\$100,700	\$108,150	\$115,600	\$123,050
San Joaquin	\$29,000	\$33,150	\$37,300	\$41,400	\$44,750	\$48,050	\$51,350	\$54,650
San Luis Obispo	\$38,300	\$43,800	\$49,250	\$54,700	\$59,100	\$63,500	\$67,850	\$72,250
San Mateo	\$65,250	\$74,600	\$83,900	\$93,200	\$100,700	\$108,150	\$115,600	\$123,050
Santa Barbara	\$48,900	\$55,900	\$62,900	\$69,850	\$75,450	\$81,050	\$86,650	\$92,250
Santa Clara	\$59,000	\$67,400	\$75,850	\$84,250	\$91,000	\$97,750	\$104,500	\$111,250
Santa Cruz	\$54,450	\$62,200	\$70,000	\$77,750	\$84,000	\$90,250	\$96,450	\$102,650
Shasta	\$27,800	\$31,800	\$35,750	\$39,700	\$42,900	\$46,100	\$49,250	\$52,450
Sierra	\$31,500	\$36,000	\$40,500	\$45,000	\$48,600	\$52,200	\$55,800	\$59,400
Siskiyou	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450
Solano	\$38,050	\$43,450	\$48,900	\$54,300	\$58,650	\$63,000	\$67,350	\$71,700
Sonoma	\$41,600	\$47,550	\$53,500	\$59,400	\$64,200	\$68,950	\$73,700	\$78,450
Stanislaus	\$27,900	\$31,900	\$35,900	\$39,850	\$43,050	\$46,250	\$49,450	\$52,650
Butler	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450
Tehama	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450
Tulare	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450
Tuolumne	\$29,150	\$33,300	\$37,450	\$41,600	\$44,950	\$48,300	\$51,600	\$54,950
Ventura	\$43,900	\$50,200	\$56,450	\$62,700	\$67,750	\$72,750	\$77,750	\$82,800
Yolo	\$34,700	\$39,650	\$44,600	\$49,550	\$53,550	\$57,500	\$61,450	\$65,450
Yuba	\$27,300	\$31,200	\$35,100	\$38,950	\$42,100	\$45,200	\$48,300	\$51,450

AHD Development Budget

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	\$1,849,592	\$1,849,592				
Demolition	\$0					
Legal	\$80,000	\$80,000				
Land Lease Rent Prepayment	\$0					
Total Land Cost or Value	\$1,929,592	\$1,929,592	\$0			
Existing Improvements Cost or Value	\$0					
Off-Site Improvements	\$0					
Total Acquisition Cost	\$0	\$0	\$0		\$0	
Total Land Cost / Acquisition Cost	\$1,929,592	\$1,929,592	\$0			
Predevelopment Interest/Holding Cost	\$212,267	\$212,267				
Assumed, Accrued Interest on Existing Debt (Rehab/Acq)	\$0					The holding costs shown are related to the land acquisition and therefore excluded from eligible basis
Excess Purchase Price Over Appraisal	\$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	\$3,808,642	\$3,808,642		\$3,808,642		
Structures	\$86,891,083	\$86,891,083		\$86,891,083		
General Requirements	\$0					
Contractor Overhead	\$0					
Contractor Profit	\$0					
Prevailing Wages	\$0					
General Liability Insurance	\$0					
Urban Greening	\$100,000	\$100,000		\$100,000		
Other New Construction (Specify)	\$0					
Other New Construction (Specify)	\$0					
Other New Construction (Specify)	\$0					
Total New Construction Costs	\$90,799,725	\$90,799,725	\$0	\$90,799,725	\$0	
ARCHITECTURAL FEES						
Design	\$2,620,500	\$2,620,500		\$2,620,500		
Supervision	\$0					
Total Architectural Costs	\$2,620,500	\$2,620,500	\$0	\$2,620,500	\$0	
Total Survey & Engineering	\$280,000	\$280,000		\$280,000		
CONSTRUCTION INTEREST & FEES						
Construction Loan Interest	\$16,758,196	\$16,758,196		\$8,035,096		Only the construction loan interest fo the construction period is included in basis, only a portion of the origination fee are basis eligible, cost of issuance and CDLAC/CDIAC fees are excluded from basis due to being attributable to the bonds
Origination Fee	\$604,845	\$604,845		\$153,153		
Credit Enhancement/Application Fee	\$0					
Bond Premium	\$0					
Cost of Issuance	\$817,845	\$817,845				
Title & Recording	\$50,000	\$50,000		\$50,000		
Taxes	\$0					
Insurance	\$3,726,697	\$3,726,697		\$3,726,697		
Employment Reporting	\$0					
Bond Financial Advisor + Lender expenses	\$50,000	\$50,000		\$20,128		
CDLAC/CDIAC Fees	\$31,210	\$31,210				
Total Construction Interest & Fees	\$22,038,793	\$22,038,793	\$0	\$11,985,074	\$0	
PERMANENT FINANCING						
Loan Origination Fee	\$131,070	\$131,070				Costs related to the the permanent phase are excluded from basis
Credit Enhancement/Application Fee	\$0					
Title & Recording	\$20,000	\$20,000				
Taxes	\$0					
Insurance	\$0					

AHD Development Budget

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
Lender Expenses	\$20,000	\$20,000				
Other Perm. Financing Costs (Specify)	\$0					
Total Permanent Financing Costs	\$171,070	\$171,070	\$0			
Subtotals Forward	\$118,051,947	\$118,051,947	\$0	\$105,685,299	\$0	
LEGAL FEES						
Legal Paid by Applicant	\$185,000	\$185,000		\$60,000		Syndication legal related costs and perm closing costs are not basis eligible
Construction Lender Legal+ Bond Counsel	\$100,000	\$100,000		\$7,596		
Perm Lender Legal	\$50,000	\$50,000				
Other Attorney Costs (Specify)	\$0					
Total Attorney Costs	\$335,000	\$335,000	\$0	\$67,596	\$0	
RESERVES						
Operating Reserve	\$741,155	\$741,155				Reserves are related to the permanent phase and not basis eligible
Replacement Reserve	\$0					
Transition Reserve Pool Fee	\$0					
Rent Reserve	\$0					
Other Reserve Costs (Specify)	\$0					
Other Reserve Costs (Specify)	\$0					
Other Reserve Costs (Specify)	\$0					
Total Reserve Costs	\$741,155	\$741,155	\$0			
CONTINGENCY COSTS						
Construction Hard Cost Contingency	\$13,619,959	\$13,619,959		\$13,619,959		
Soft Cost Contingency	\$1,259,322	\$1,259,322		\$1,259,322		
Total Contingency Costs	\$14,879,281	\$14,879,281	\$0	\$14,879,281	\$0	
OTHER PROJECT COSTS						
TCAC App/Allocation/Monitoring Fees	\$123,090	\$123,090				Start-up/lease up are related to the permanenet phase and not basis eligible
Environmental Audit	\$15,000	\$15,000		\$15,000		
Local Development Impact Fees	\$1,074,528	\$1,074,528		\$1,074,528		
Permit Processing Fees	\$1,260,000	\$1,260,000		\$1,260,000		
Capital Fees	\$0					
Marketing	\$238,750	\$238,750				
Furnishings	\$400,000	\$400,000		\$400,000		
Market Study	\$10,000	\$10,000				
Accounting/Reimbursable	\$50,000	\$50,000				
Appraisal Costs	\$10,000	\$10,000		\$10,000		
Broadband Readiness	\$0					
Special Inspections/Testing & Construction Inspection	\$400,000	\$400,000		\$400,000		
Entitlements & Infrastructure soft costs	\$1,417,246	\$1,417,246		\$1,417,246		
Start-up/lease up	\$318,000	\$318,000				
Security During Construction	\$400,000	\$400,000		\$400,000		
Printing + Syndication Consulting	\$107,500	\$107,500		\$32,500		
Total Other Costs	\$5,824,114	\$5,824,114	\$0	\$5,009,274	\$0	
SUBTOTAL PROJECT COST	\$139,831,497	\$139,831,497	\$0	\$125,641,450	\$0	
DEVELOPER COSTS						
Developer Overhead/Profit	\$18,846,218	\$18,846,218		\$18,846,218		
Consultant/Processing Agent	\$0					
Project Administration	\$0					
Broker Fees Paid to a Related Party	\$0					
Construction Oversight by Developer	\$0					
Other Developer Costs (Specify)	\$0					
Total Developer Costs	\$18,846,218	\$18,846,218	\$0	\$18,846,218	\$0	
TOTAL PROJECT COST	\$158,677,715	\$158,677,715	\$0	\$144,487,668	\$0	
Eligible Basis:				\$144,487,668	\$0	
Total Eligible Basis:				\$144,487,668		

	DF 2022
Total Developer Fee (equals Total Developer Costs above):	\$18,846,218
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:	\$7,023,109
Developer Fee Contributed as Capital:	\$8,323,109

Scroll to the Right for more data input (sources) ----->

Balboa Building A (Balboa Gateway) AHD and HRI Permanent Sources and Uses App AHSC0001030

Residential Sources and Uses Budget

USES OF FUNDS Soft cost in red (total AHSC AHD below) \$0	Total Cost from AHD Dev Budget	AHSC AHD Funding	Tax-Exempt Bond Loan	MOHCD Gap Financing Loan	RCP Subsidy Loan											Deferred Developer Fees	Developer Fee Contribution	GP Equity	Gross Tax Credit Equity	Total Residential Sources	Residential Costs	Commercial Costs			Residential Cost Difference Dev Budget vs. Sources	
																					Total	Total				
LAND COST/ACQUISITION																										
Land Cost or Value	\$1,849,592																		\$1,849,592	\$1,849,592	\$1,849,592	\$0			\$0	
Demolition	\$0																		\$0	\$0	\$0	\$0			\$0	
Legal	\$80,000																		\$80,000	\$80,000	\$80,000	\$0			\$0	
Land Lease Rent Prepayment	\$0																		\$0	\$0	\$0	\$0			\$0	
Total Land Cost or Value	\$1,929,592	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,929,592	\$1,929,592	\$1,929,592	\$0	\$0	\$0	\$0	
Existing Improvements Cost or Value	\$0																			\$0	\$0	\$0			\$0	
Off-Site Improvements	\$0																			\$0	\$0	\$0			\$0	
Total Acquisition Cost	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Land Cost / Acquisition Cost	\$1,929,592	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,929,592	\$1,929,592	\$1,929,592	\$0	\$0	\$0	\$0	
Predevelopment Interest/Holding Cost	\$212,267																		\$212,267	\$212,267	\$212,267	\$0			\$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	\$0	\$0	\$0	\$0	\$0
Total Relocation Expenses	\$0																			\$0	\$0	\$0				\$0

NEW CONSTRUCTION

Site Work	\$3,808,642																		\$3,808,642	\$3,808,642	\$3,808,642	\$0				\$0
Structures	\$86,891,083	\$32,900,000	\$13,107,000	\$14,000,000	\$5,722,119														\$21,161,964	\$86,891,083	\$86,891,083	\$0				\$0
General Requirements	\$0																		\$0	\$0	\$0	\$0				\$0
Contractor Overhead	\$0																		\$0	\$0	\$0	\$0				\$0
Contractor Profit	\$0																		\$0	\$0	\$0	\$0				\$0
Prevailing Wages	\$0																		\$0	\$0	\$0	\$0				\$0
General Liability Insurance	\$0																		\$0	\$0	\$0	\$0				\$0
Urban Greening	\$100,000	\$100,000																	\$0	\$100,000	\$100,000	\$0				\$0
Other New Construction (Specify)	\$0																		\$0	\$0	\$0	\$0				\$0
Other New Construction (Specify)	\$0																		\$0	\$0	\$0	\$0				\$0
Other New Construction (Specify)	\$0																		\$0	\$0	\$0	\$0				\$0
Total New Construction Costs	\$90,799,725	\$33,000,000	\$13,107,000	\$14,000,000	\$5,722,119	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$24,970,606	\$90,799,725	\$90,799,725	\$0	\$0		\$0	\$0

ARCHITECTURAL FEES

Design	\$2,620,500																		\$2,620,500	\$2,620,500	\$2,620,500	\$0				\$0
Supervision	\$0																		\$0	\$0	\$0	\$0				\$0
Total Architectural Costs	\$2,620,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,620,500	\$2,620,500	\$2,620,500	\$0	\$0		\$0	\$0
Total Survey & Engineering	\$280,000																		\$280,000	\$280,000	\$280,000	\$0				\$0

CONSTRUCTION INTEREST & FEES

Construction Loan Interest	\$16,758,196																		\$16,758,196	\$16,758,196	\$16,758,196	\$0				\$0
Origination Fee	\$604,845																		\$604,845	\$604,845	\$604,845	\$0				\$0
Credit Enhancement/Application Fee	\$0																		\$0	\$0	\$0	\$0				\$0
Bond Premium	\$0																		\$0	\$0	\$0	\$0				\$0
Cost of Issuance	\$817,845																		\$817,845	\$817,845	\$817,845	\$0				\$0
Title & Recording	\$50,000																		\$50,000	\$50,000	\$50,000	\$0				\$0
Taxes	\$0																		\$0	\$0	\$0	\$0				\$0
Insurance	\$3,726,697																		\$3,726,697	\$3,726,697	\$3,726,697	\$0				\$0
Employment Reporting	\$0																		\$0	\$0	\$0	\$0				\$0
Bond Financial Advisor + Lender expenses	\$50,000																		\$50,000	\$50,000	\$50,000	\$0				\$0
CDLAC/CDIAC Fees	\$31,210																		\$31,210	\$31,210	\$31,210	\$0				\$0

Residential Sources and Uses Budget

USES OF FUNDS Soft cost in red (total AHSC AHD below) \$0	Total Cost from AHD Dev Budget	AHSC AHD Funding	Tax-Exempt Bond Loan	MOHCD Gap Financing Loan	RCP Subsidy Loan											Deferred Developer Fees	Developer Fee Contribution	GP Equity	Gross Tax Credit Equity	Total Residential Sources	Commercial Sources				
																					Residential Costs	Commercial Costs			Residential Cost Difference Dev Budget vs. Sources
																					Total	Total			
Total Construction Interest & Fees	\$22,038,793	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$22,038,793	\$22,038,793	\$22,038,793	\$0	\$0	\$0	\$0

PERMANENT FINANCING

Loan Origination Fee	\$131,070																		\$131,070	\$131,070	\$131,070	\$0			\$0
Credit Enhancement/Application Fee	\$0																		\$0	\$0	\$0	\$0			\$0
Title & Recording	\$20,000																		\$20,000	\$20,000	\$20,000	\$0			\$0
Taxes	\$0																		\$0	\$0	\$0	\$0			\$0
Insurance	\$0																		\$0	\$0	\$0	\$0			\$0
Lender Expenses	\$20,000																		\$20,000	\$20,000	\$20,000	\$0			\$0
Other Perm. Financing Costs (Specify)	\$0																		\$0	\$0	\$0	\$0			\$0
Total Permanent Financing Costs	\$171,070	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$171,070	\$171,070	\$171,070	\$0	\$0	\$0	\$0
Subtotals Forward	\$118,051,947	\$33,000,000	\$13,107,000	\$14,000,000	\$5,722,119	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$52,222,828	\$118,051,947	\$118,051,947	\$0	\$0	\$0	\$0

LEGAL FEES

Legal Paid by Applicant	\$185,000																		\$185,000	\$185,000	\$185,000	\$0			\$0
Construction Lender Legal+ Bond Counsel	\$100,000																		\$100,000	\$100,000	\$100,000	\$0			\$0
Perm Lender Legal	\$50,000																		\$50,000	\$50,000	\$50,000	\$0			\$0
Other Attorney Costs (Specify)	\$0																		\$0	\$0	\$0	\$0			\$0
Total Attorney Costs	\$335,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$335,000	\$335,000	\$335,000	\$0	\$0	\$0	\$0

RESERVES

Operating Reserve	\$741,155																		\$741,155	\$741,155	\$741,155	\$0			\$0
Replacement Reserve	\$0																		\$0	\$0	\$0	\$0			\$0
Transition Reserve Pool Fee	\$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	\$741,155	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$741,155	\$741,155	\$741,155	\$0	\$0	\$0	\$0

CONTINGENCY COSTS

Construction Hard Cost Contingency	\$13,619,959																		\$13,619,959	\$13,619,959	\$13,619,959	\$0			\$0
Soft Cost Contingency	\$1,259,322																		\$1,259,322	\$1,259,322	\$1,259,322	\$0			\$0
Total Contingency Costs	\$14,879,281	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$14,879,281	\$14,879,281	\$14,879,281	\$0	\$0	\$0	\$0

OTHER PROJECT COSTS

TCAC App/Allocation/Monitoring Fees	\$123,090																		\$123,090	\$123,090	\$123,090	\$0			\$0
Environmental Audit	\$15,000																		\$15,000	\$15,000	\$15,000	\$0			\$0
Local Development Impact Fees	\$1,074,528																		\$1,074,528	\$1,074,528	\$1,074,528	\$0			\$0
Permit Processing Fees	\$1,260,000																		\$1,260,000	\$1,260,000	\$1,260,000	\$0			\$0
Capital Fees	\$0																		\$0	\$0	\$0	\$0			\$0
Marketing	\$238,750																		\$238,750	\$238,750	\$238,750	\$0			\$0
Furnishings	\$400,000																		\$400,000	\$400,000	\$400,000	\$0			\$0
Market Study	\$10,000																		\$10,000	\$10,000	\$10,000	\$0			\$0
Accounting/Reimbursable	\$50,000																		\$50,000	\$50,000	\$50,000	\$0			\$0
Appraisal Costs	\$10,000																		\$10,000	\$10,000	\$10,000	\$0			\$0
Broadband Readiness	\$0																		\$0	\$0	\$0	\$0			\$0
Special Inspections/Testing & Construction Inspection + Construction Supervision	\$400,000																		\$400,000	\$400,000	\$400,000	\$0			\$0
Entitlements & Infrastructure soft costs	\$1,417,246																		\$1,417,246	\$1,417,246	\$1,417,246	\$0			\$0
Start-up/lease up	\$318,000																		\$318,000	\$318,000	\$318,000	\$0			\$0
Security During Construction	\$400,000																		\$400,000	\$400,000	\$400,000	\$0			\$0
Printing + Syndication Consulting	\$107,500																		\$107,500	\$107,500	\$107,500	\$0			\$0
Total Other Costs	\$5,824,114	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$5,824,114	\$5,824,114	\$5,824,114	\$0	\$0	\$0	\$0
SUBTOTAL PROJECT COST	\$139,831,497	\$33,000,000	\$13,107,000	\$14,000,000	\$5,722,119	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$74,002,378	\$139,831,497	\$139,831,497	\$0	\$0	\$0	\$0

DEVELOPER COSTS

Developer Overhead/Profit	\$18,846,218																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																</
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Residential Sources and Uses Budget

USES OF FUNDS Soft cost in red (total AHSC AHD below) \$0	Total Cost from AHD Dev Budget	AHSC AHD Funding	Tax-Exempt Bond Loan	MOHCD Gap Financing Loan	RCP Subsidy Loan											Deferred Developer Fees	Developer Fee Contribution	GP Equity	Gross Tax Credit Equity	Total Residential Sources	Commercial Sources		Residential Cost Difference Dev Budget vs. Sources
																					Residential Costs	Commercial Costs	
																					Total	Total	
TOTAL PROJECT COST	\$158,677,715	\$33,000,000	\$13,107,000	\$14,000,000	\$5,722,119	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$8,323,109	\$8,323,109	\$100	\$76,202,278	\$158,677,715	\$158,677,715	\$0	\$0	\$0
AHD TOTAL PROJECT COSTS	\$158,677,715	\$33,000,000	\$13,107,000	\$14,000,000	\$5,722,119	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$8,323,109	\$8,323,109	\$100	\$76,202,278	\$158,677,715	\$158,677,715	\$0	\$0	\$0
TOTAL AHD PROJECT COSTS		\$33,000,000	\$13,107,000	\$14,000,000	\$5,722,119	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$8,323,109	\$8,323,109	\$100	\$76,202,278	\$158,677,715	\$158,677,715	\$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.

End of Document

Annual Income and Expenses

Employee Information

Comments

No.	FTE	Employee Job Title	Salary/Wages	Value of Free Rent	
2	2.00	On-Site Manager(s)	\$128,808	\$55,500	
1	1.00	On-Site Assistant Manager(s)	\$55,000		
		Supportive Services Staff Supervisor(s)			
		Supportive Services Coordinator, On-Site			
		Other Supportive Services Staff (inc. Case Manager)			
2	2.00	On-Site Maintenance Employee(s)	\$92,020		
		On-Site Leasing Agent/Administrative Employee(s)			
		On-Site Security Employee(s)			
		Other (specify)			
		Other (specify)			
		Total Salaries and Value of Free Rent Units	\$275,828	\$55,500	
6711		Payroll Taxes	\$27,583	Show free rent as an expense?	
6722		Workers Compensation	\$24,825		
6723		Employee Benefits	\$70,066		
		Employee(s) Payroll Taxes, Workers Comp. & Benefits	\$122,474		
		Total Employee(s) Expenses	\$398,302		

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	884	
None	On-Site Manager(s)	3	1,170	
		Total Square Footage	2,054	

Annual Operating Budget

Acct. No.	Revenue - Income	Residential	Commercial	Comments
5120/5140	Rent Revenue - Gross Potential		\$0	
	Restricted Unit Rents	\$3,250,788		The project has rent restrictions from SF MOH
	Unrestricted Unit Rents	\$0		
5121	Tenant Assistance Payments			
	Subsidy Program Name (Specify)	\$0		
	Subsidy Program Name (Specify)	\$0		
	Operating Subsidies			
	Other (specify)			
5910	Laundry and Vending Revenue	\$26,064		
5170	Parking Spaces	\$0	\$0	
5990	Miscellaneous/Other Rent Revenue	\$0	\$0	
	Gross Potential Income (GPI)	\$3,276,852	\$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)	\$163,843	\$0	
	Effective Gross Income (EGI)	\$3,113,009	\$0	
Acct. No.	Expenses	Residential	Commercial	Comments
Administrative Expenses: 6200/6300				
6203	Conventions and Meetings			
6210	Advertising and Marketing	\$1,500		
6250	Other Renting Expenses			
6310	Office/Administrative Salaries -- from above	\$0		
6311	Office Expenses			

Annual Income and Expenses

6312	Office or Model Apartment Rent			
6320	Management Fee	\$124,020		
6330	Site/Resident Manager(s) Salaries -- from above	\$183,808		
6331	Administrative Free Rent Unit -- from above	\$0		
6340	Legal Expense -- Project	\$6,000		
6350	Audit Expense	\$32,634		
6351	Bookkeeping Fees/Accounting Services			
6390	Miscellaneous Administrative Expenses	\$75,520		
6263T	Total Administrative Expenses	\$423,482	\$0	

Annual Income and Expenses

Acct. No.	Expenses	Residential	Commercial	Comments
Utilities Expenses: 6400				
6450	Electricity	\$54,300		
6451	Water	\$122,128		
6452	Gas			
6453	Sewer	\$161,224		
	Other Utilities (specify)			
6400T	Total Utilities Expenses	\$337,652	\$0	
Operating and Maintenance Expenses: 6500				Comments
6510	Payroll -- from above	\$92,020		
6515	Supplies	\$4,500		
6520	Contracts	\$71,920		
6521	Operating & Maintenance Free Rent Unit -- from above	\$0		
6525	Garbage and Trash Removal	\$108,600		
6530	Security Contract	\$26,000		
6531	Security Free Rent Unit -- from above	\$0		
6546	Heating/Cooling Repairs and Maintenance	\$12,000		
6548	Snow Removal			
6570	Vehicle & Maintenance Equipment Operation/Reports			
6590	Miscellaneous Operating and Maintenance Expenses	\$69,708		Pest Control + Grounds + Elevator + HVAC +
6500T	TOTAL Operating & Maintenance Expenses	\$384,748	\$0	
Taxes and Insurance: 6700				Comments
6710	Real Estate Taxes	\$3,000		
6711	Payroll Taxes (Project's Share) -- from above	\$27,583		
6720	Property and Liability Insurance (Hazard)	\$177,869		
6729	Other Insurance (e.g. Earthquake)			
6721	Fidelity Bond Insurance			
6722	Worker's Compensation -- from above	\$24,825		
6723	Health Insurance/Other Employee Benefits--from above	\$70,066		
6790	Miscellaneous Taxes, Licenses, Permits & Insurance	\$158,890		HOA fee for common area infrastructure
6700T	Total Taxes and Insurance	\$462,233	\$0	
Supportive Services Costs: 6900				Comments
6990	Staff Supervisor(s) Salaries - from above	\$0		
6990	Services Coordinator Salaries, On-Site - from above	\$0		
6990	Other Supportive Services Staff Salaries - from above	\$0		
6990	Supportive Services Admin Overhead			
6990	Other Supportive Services Costs (YMCA Contracted Serv	\$97,000		
6990	Other Supportive Services Costs (specify)			
6900T	Total Supportive Services Costs	\$97,000	\$0	
	Total Operating Expenses	\$1,705,115	\$0	Comments
Funded Reserves: 7200		Residential	Commercial	
7210	Required Replacement Reserve Deposits	\$79,500		
7220	Other Reserves (specify)			
7230	Other Reserves (specify)			
7240	Other Reserves (specify)			
	Total Reserves	\$79,500	\$0	
	Ground Lease	Residential	Commercial	
	Ground Lease	\$15,000	\$0	
	Total Ground Lease	\$15,000	\$0	
	Net Operating Income	\$1,313,395	\$0	
Financial Expenses: 6800				Comments
6820	1st Mortgage Debt Service	\$987,172		
6830	2nd Mortgage Debt Service			
6840	3rd Mortgage Debt Service			
6890	AHSC .42% Fee	\$138,600		
6890	Other HCD .42% (Specify)			
6890	Other HCD .42% (Specify)			
6890	Bond Issuer Fee	\$16,384		
6890	Miscellaneous Financial Expenses (specify)			
6890	Miscellaneous Financial Expenses (specify)			
6890	Miscellaneous Financial Expenses (specify)			

Annual Income and Expenses

6890	Miscellaneous Financial Expenses (specify)			
6800T	Total Financial Expenses	\$1,142,156	\$0	
	Cash Flow	\$171,239	\$0	
7190	Asset Management/Similar Fees	\$36,878		

Total Operating Expenses Per Unit	Per Year	Per Month	
Without any Adjustments	\$10,724	\$894	
With the Value of Rent-Free Units Included	\$10,724	\$894	
Without RE Taxes, Social Services Coordinator or Social Services/Social Programs and With the Value of Rent Fee Units Included	\$10,095	\$841	

HCD Reserve Requirements

Project Name	Balboa Building A (Balboa Gateway)	Number of Project Units:	159
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Replacement Reserve Calculator UMR \$8309

(a)	0.6% of New construction costs (structures excluding contractor profit, overhead, and general requirements and insurance): \$500 per unit: (This is a placeholder for rehab projects and may be subject to higher amount)	\$90,799,725	\$544,798
		\$500	\$79,500
(b)	Replacement Reserve Amount = <i>New construction: lesser of (a) and (b); Rehab: (b)</i> HCD Required Replacement Reserve Amount - <i>included in "Operating budget"</i> tab		\$79,500
			\$79,500

Operating Reserve Calculator

1	Total Operating Expenses Excluding On-Site Service Coordinator Salaries. <i>Operating Budget Cell (E111) minus Operating Budget Cell (E105)</i>			TAX CREDIT Project 3 Month Reserve Required	NON-TAX CREDIT Project 4 Month Reserve Required	
	(a) Total Operating Expenses:	\$1,705,115	Amount subject to reserve calculation: <i>(a - b)</i>	\$1,705,115	\$426,279	\$568,372
	(b) <i>Minus</i> : On-Site Service Coordinator Salaries:	\$0				
2	Replacement Reserve amount from <i>above</i> : <i>(Cell AJ10)</i>			\$544,798	\$136,200	\$181,599
3	Debt Service (including all HCD 0.42% Fees and Bond Issuer Fee)					
	Name of Lender <i>Operating Budget cells (D123 to D132)</i>			Annual Debt Service Amount	TAX CREDIT Project 3 Month Reserve Required	NON-TAX CREDIT Project 4 Month Reserve Required
	1st Mortgage Debt Service			\$987,172	\$246,793	\$329,057
	2nd Mortgage Debt Service			\$0	\$0	\$0
	3rd Mortgage Debt Service			\$0	\$0	\$0
	AHSC .42% Fee			\$138,600	\$34,650	\$46,200
	Other HCD .42% (Specify)			\$0	\$0	\$0
	Bond Issuer Fee			\$16,384	\$4,096	\$5,461
	Miscellaneous Financial Expenses (specify)			\$0	\$0	\$0
	Miscellaneous Financial Expenses (specify)			\$0	\$0	\$0
	Miscellaneous Financial Expenses (specify)			\$0	\$0	\$0
	Miscellaneous Financial Expenses (specify)			\$0	\$0	\$0
	Other <i>(Specify)</i>				\$0	\$0
	Totals			\$1,142,156	\$285,539	\$380,719
UMR Required Operating Reserve Amount:				\$848,017	\$1,130,690	

If Reserve amounts are different than the required amount, enter Reserve amounts and how they are calculated below:

Cell AB16 is incorrectly pulling from AH7 rather than AJ10, once that is corrected the reserve amount should line up except for a 5198 difference which represents 3 months of the AHSC .42 Fee with a 1.15 underwriting cushion which is what an investor would require.

Transition Reserve Pool Fee Calculator [Pooled Transition Reserve Policy](#)

Does the Project propose use of Project-based rental assistance?	No
--	----

Is Income from Restricted Units based on Restricted or Proposed Rents?

Total Deferred Developer Fee
budgeted for payment prior to
distributions and residual receipt
payments

Unit Size	2022 TCAC Threshold Basis Limits (TBL)	# of Units	Basis x Number of Units	TOTAL UNADJUSTED THRESHOLD BASIS LIMIT (TBL):	\$116,753,618
SRO/Studio	\$530,910	17	\$9,025,470	TOTAL HCD ADJ. THRESHOLD BASIS LIMIT:	\$157,617,385
1 Bedroom	\$612,134	46	\$28,158,164	Adjusted Threshold Basis Limit multiplied by 160%:	\$252,187,816
2 Bedrooms	\$738,400	54	\$39,873,600	HCD HIGH COST TEST RESULT FOR: Balboa Building A (Balboa Gateway)	92%
3 Bedrooms	\$945,152	42	\$39,696,384		
4+ Bedrooms	\$1,052,958	0	\$0		
				Total Eligible Basis	\$144,487,668

Manager Units in Project:	0	TOTAL UNITS:	159
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Costs Reasonable

ADJUSTMENTS Cal Code of Reg §10327(c)(5)(A-F)

(A)	Adjustment for Projects 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	\$23,350,724
	For Projects 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 apprenticeable occupation in the building and construction trades (5%).				Yes	\$5,837,681
(B)	For New construction Projects 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%).					\$0
(C)	For Projects where a day care center is part of the development (2%).					\$0
(D)	For Projects where 100 percent of the units are for Special Needs populations (2%).					\$0
(E)	Project applying under §10325 or §10326 of the TCAC regulations that includes one or more of the features below (up to 10%).					\$0
(F)	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).					\$0
	If Yes, select type of work:		Enter Certified Costs of Work:			
(G)	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.					
(H)	Projects where at least 95% of the Project's upper floor units are serviced by an elevator (10%).				Yes	\$11,675,362
(I)	Projects 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%).					\$0
(J)	Projects wherein at least 95% of the building(s) is constructed as (1) a Type III as defined in the California Building Code, or (2) a Type III/Type I combination, in which case, the Type I 15% increase above is not be allowed (10%).					\$0
(K)	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	TCAC/HCD Opportunity Area Map Tract ID #:		Opportunity Map Resource Level:	

End of Document

HCD 2022 Developer Fee Calculator - revised 06/08/2022

Project Name: Balboa Building A (Balboa Gateway)

TCAC Project #

Project Phase: Origination

Proposed Project Type:

4% Credits New Construction

Project's Developer Fee Summary

	HCD Limit	Project Amt.
Maximum Total Developer Fee - 2d	\$18,846,218	\$18,846,218
Max Developer Fee payable from development funding sources - lesser of 1e & 2d	\$2,200,000	\$2,200,000
Deferred Developer Fee payable on a priority basis from available Cash Flow	\$1,300,000	\$1,300,000
Deferred Developer Fee payable exclusively from Sponsor Distributions	\$15,346,218	\$7,023,109

Total Budgeted or Actual Developer Fee:

\$18,846,218

Developer Fee Contributed as Capital:

\$8,323,109

Deferred Developer Fee:

\$8,323,109

Section 2. UMR §8312(c) - Maximum Developer Fee using TCAC 4% rules

Project meeting CDLAC §5230(f)(1)(B), TCAC §10327(c)(2)(E)?

a. New Construction & Rehab - Unadjusted Eligible Basis (exclude Developer Fee) - §10327(c)(2)(B)(i)	\$125,641,450	x 15% =	\$18,846,218
b. Basis for non-residential Project costs (exclude Developer Fee) - §10327(c)(2)(B)(ii)	\$0	x 15% =	\$0
c1. Not Applicable			
c2. Not Applicable			
c3. Not Applicable			
c4. Not Applicable	\$0	X 5% =	\$0
d. Maximum Total Developer Fee using TCAC 4% rules §8312(c)			\$18,846,218
e. Total Budgeted or Actual Developer Fee			\$18,846,218
f. Budgeted Developer Fee paid from Development Sources	Sum of Deferred and Contributed Developer Fee	\$16,646,218	\$2,200,000
g. Deferred Developer Fee payable on a priority basis from available Cash Flow			\$1,300,000

End of Document

Program Threshold Requirements

§106 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 the following:

- (1) Applicant(s) certifies that 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 a completed GHG Benefits Calculator tool, described in the AHSC Application, displaying VMT and GHG reductions for each Project component.

[CARB Quantification Methodology](#)

- (2) Applicant(s) certifies that the proposed Project supports the implementation of the applicable Sustainable Community Strategy (SCS), as confirmed by the Metropolitan Planning Organization (MPO), or equivalent 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.

File Name	SCS Consistency Confirmation	Document from MPO identified above confirming consistency with SCS, or alternative planning strategy in non-MPO regions, per §106(a).	Uploaded to HCD?	Yes
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- (3) Applicant(s) certifies that the proposed Project must be consistent with the State Planning Priorities established pursuant to Section 65041.1 of the Government Code.

- (4) Applicant(s) certifies that all proposed Affordable Housing Developments located in a jurisdiction that has fare-based transit must provide at least one (1) transit pass or card to each Restricted Unit for at least 3 years. If the transit agency does not provide passes with unlimited rides, 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 pursuant to §103(b)(2).

Each of the restricted units will be provided with one (1) free transit pass 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.

# of passes or cards that will be provided:	157	Is there at least one pass per restricted unit?	TRUE	Type of transit passes provided:	Free Transit Pass
Annual Transit Passes Value	\$1,176	Duration of Funding for Transit Passes (years)?	3		

- (5) Applicant(s) certifies that Applicants of all proposed rental Affordable Housing Developments must certify that the development will be smoke free and demonstrate compliance by submitting a draft of the development's Smoke Free Housing lease addendum.

File Name	SFH Lease Addendum	Submit a draft of the development's Smoke Free Housing lease addendum.	Uploaded to HCD?	Yes
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- (6) The AHSC-funded components of the Project must:

- (A) Applicant(s) certifies to incorporate more than one Urban Greening feature with dedicated maintenance for at least two years. The grantee is ultimately responsible for the maintenance of the Urban Greening features in the Project, even if municipal ordinance assigns responsibility for their maintenance to adjacent property owners. Applicants must propose at least \$200,000 in reasonable direct Urban Greening costs.

Urban street canopy						Urban heat island mitigation and energy conservation efforts				
Urban Greening costs:	AHD:	\$100,000	HRI:	\$0	STI:	\$200,000	TRA:	\$0	Meets threshold requirement?	TRUE

- (B) Applicant(s) certifies that the Project 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) Applicant(s) certifies to the 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.

Yes

(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 Section 106(7) 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.

AHD environmental clearances

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

The project went through CEQA as a part of approval of the Special Use District and the Board of Supervisors certified the EIR on August 28, 2020.

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

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

STI Project 1 - BART rail cars were 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. BART rail cars Authority to Use Grant Funds: See MTC Resolution No. 4123 adopted on 12/18/13, attached to Enforceable Funding Commitment letter from BART.

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

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

The 29 Sunset project is a part of the Muni Forward Project, formerly called the Transit Effectiveness project. All planned Muni Forward projects were included in the programmatic EIR for Transit Effectiveness, approved on 3/27/14. Specific improvements, such as boarding islands, curb cuts, pedestrian bulbs are categorically exempt from CEQA.

File Name	TRA Environmental	Copy of all environmental clearances (e.g. Environmental Impact Report) or Notice of Exemption.	Uploaded to HCD?	Yes
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- (8) Applications must demonstrate that all necessary discretionary local land use approvals, excluding design review, have been granted.

Have all necessary discretionary local land use approvals, excluding design review, have been granted?

Yes

AHD discretionary local land use approvals

Agency / Issuer	Land Use Approval Date	Approval Type	Comments
City/County of San Francisco	2/18/21	Development Plan Approval	The development agreement, special use district, CEQA, and EIR were all certified by the Board of Supervisors on August 28, 2020. The Development Agreement was subsequently executed on 2/18/2021

STI discretionary local land use approvals

Agency / Issuer	Land Use Approval Date	Approval Type	Comments
N/A	N/A	N/A	There are no local land use approvals necessary in the public right of way.
City/County of San Francisco	2/18/21	Development Plan Approval	The development agreement, special use district, CEQA, and EIR were all certified by the Board of Supervisors on August 28, 2020. The Development Agreement was subsequently executed on 2/18/2021

TRA discretionary local land use approvals

Agency / Issuer	Land Use Approval Date	Approval Type	Comments
N/A	N/A	N/A	There are no local land use approvals necessary in the public right of way.

- (9) Applicant(s) certifies that the application is sufficiently complete to assess the feasibility of the proposed project and its compliance with AHSC Program and application requirements.

Yes

Yes

Yes

Yes

Make sure to submit **all** "Enforceable Funding Commitments" for the proposed AHD and/or HRI project as stated at the "Dev Sources" sheet/tab.

Yes

[illegible]

Yes

[illegible]

Total Committed Non-AHSC TRA Funds		\$202,500					TOTAL (must equal TRA Budget Amt)		\$1,702,500	
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 1 non-AHSC TRA funding commitments.					Uploaded to HCD?		Yes

PGM Enforceable Funding Commitments

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			
Yes		AHSC PGM Grant	State-HCD		\$1,003,896	Transit Passes will not contribute to \$600k PGM cap.				
Total Committed Non-AHSC PGM Funds		\$0				TOTAL (must equal PGM Budget Amount)			\$1,003,896	
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

Applicant(s) certifies that the Eligible Applicant or Locality serving as the Developer of a particular component of the Project must demonstrate site control of the property (11) on which that Project component will be located as set forth at UMR §8303 and §8316 with the additional requirement that the Applicant shall maintain site control through the award date.

Yes

(A) The following shall apply to Capital Projects:

- Where site control is in the name of another entity, the Applicant shall provide documentation, in form and substance reasonably satisfactory to the Department (e.g., a purchase and sale agreement, an option, a leasehold interest/option, a disposition and development agreement, an exclusive right to negotiate with a public agency for the acquisition of the site), which clearly demonstrates that the Applicant has some form of right to acquire or lease the Project property.

- Where site control will be satisfied by a long-term ground lease, the Department will require the execution and recordation of the Department's form lease rider at the time of closing, which shall be entered into by and among the ground lessor, the ground lessee, the Department, and any other applicable parties. In all cases, the lease rider shall be recorded against the fee interest in the Project property.

(B) For Capital Projects developed in Indian country, the following exceptions apply:

- (i) Where site control is a ground lease, the lease agreement between the Tribal Entity and the Project owner is for a period not less than 50 years; and
- (ii) An attorney's opinion regarding chain of title and current title status is acceptable in lieu of a title report

AHD Site Control

Form of site control (See Site Control in **Appendix A**) **Sales Contract** Most recent document execution date **3/30/23**
Ground Lease **No**
planned?

Below, describe property transfers occurring in connection with development of the Project.

The property was acquired by BHC Balboa Builders LLC, an entity controlled 100% by Bridge Housing Corporation, on December 20, 2022. On March 30, 2023, BHC Balboa Builders LLC entered into a purchase and sale agreement with Balboa Gateway LP, an entity formed by Bridge Housing Corporation to be the entity that will own Balboa Building A (Balboa Gateway).

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

STI Site Control

Form of site control (See Site Control in **Appendix A**) **Other (describe below)** Most recent document execution date **N/A**
Ground Lease **No**
planned?

Below, describe property transfers occurring in connection with development of the Project.

The San Francisco City Charter gives the SFMTA full authority and control of street right of ways within San Francisco.

All other proposed STI Capital Projects are located completely on sites under the site control of BART and/or Bridge Housing Corporation ☐

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

Form of site control (See Site Control in **Appendix A**) **Other (describe below)** Most recent document execution date **N/A**
Ground Lease **No**
planned?

Below, describe property transfers occurring in connection with development of the Project.

The San Francisco City Charter gives the SFMTA full authority and control of street right of ways within San Francisco.

☐

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) Applicant(s) certifies to demonstrate experience by providing evidence of at least two projects that are similar to each proposed AHSC Capital Project (AHD, HRI, STI, and TRA) in scope and size, **which have been completed by the Applicant serving as the Developer of that Project component, 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.

Yes

- (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, thereby demonstrating that the Locality or transportation agency will be serving as the STI or TRA Developer for that Capital Project.

Note: AHD/HRI Developer has to be the entity with experience per the Guidelines.

App due date **4/4/23**

AHD requisite experience

Requisite experience **project name #1** **1950 Mission**

Name of Applicant demonstrating requisite experience **BRIDGE Housing Corporation** Completion Date **5/21/2021**

Meets **ten** year requirement? **TRUE** Project tenure (in years) **1.87** Number of units **157** Units per Acre **186** Commercial (square feet) **8,380**

1950 Mission Street is a mixed use complex in San Francisco, CA, comprised of two buildings containing 157 affordable units, with 8,380 square feet of commercial space, as well as 5,587 square feet of communal resident services spaces and resident service offices on the first floor. The commercial space includes a childcare center and artist studios, and residents have access to a media lab, counseling, on-site property management, a courtyard, and a rooftop deck. 1950 Mission Street is owned by 1950 Mission Associates LP, which is wholly controlled by Bridge Housing Corporation as the Managing General Partner and operated by Bridge Property Management Company, an affiliate of Bridge Housing Corporation.

Requisite experience project name #2		735 Davis Street	
Name of Applicant demonstrating requisite experience		BRIDGE Housing Corporation	Completion Date
		7/30/21	
Meets ten year requirement?	TRUE	Project tenure (in years)	1.68
		Number of units	53
		Units per Acre	212
		Commercial (square feet)	1,260
735 Davis Street is a 100% affordable housing development for seniors in San Francisco, CA. The building contains 1,260 square feet of retail space, as well as communal spaces for residents. 735 Davis Street is owned by 735 Davis Senior LP, which is wholly controlled by Bridge Housing Corporation as the Managing General Partner and operated by Bridge Property Management Company, an affiliate of Bridge Housing Corporation.			
File Name	Past Exp AHD1, Past Exp AHD2	Certificates of Occupancy for two recently completed affordable housing developments.	Uploaded to HCD?
			Yes

STI Requisite experience for Purchase of 2 BART Rail Cars STI Capital Project

Requisite experience project name #1		Rail Car Procurement Program	
Name of Applicant demonstrating requisite experience		BART	Completion Date
		1/31/23	
Meets ten year requirement?	TRUE		
On November 8, 2017, under a contract to Bombardier Transit Corporation for the procurement of new rail cars, BART's first replacement rail cars were delivered. As of January 2023, BART has accepted 451 Fleet-of-the-Future rail cars and decommissioned 239 legacy rail cars as part of an overall program to not only replace but expand its fleet.			

Requisite experience project name #2		Procurement of eight Diesel Multiple Unit (DMU) Vehic	
Name of Applicant demonstrating requisite experience		BART	Completion Date
		5/31/18	
Meets ten year requirement?	TRUE		
Procurement of eight Diesel Multiple Unit (DMU) Vehicles to serve BART to Antioch extension. The vehicles include a variety of amenities including high-back seats, six digital signs (with multiple language support), automated audio announcements, clear station arrival / destination signs, and modern climate control systems. Project Cost: ~\$65M.			

STI Requisite experience for 29 Sunset Phase II STI Capital Project

Requisite experience project name #1		38 Geary & 38 Geary Rapid	
Name of Applicant demonstrating requisite experience		SFMTA	Completion Date
		7/1/21	
Meets ten year requirement?	TRUE		
Temporary emergency transit lanes were installed along segments of Geary Boulevard in winter 2020-21. Evaluation done in spring 2021 showed that the new transit lanes and other treatments have improved 38 Geary bus performance with minimal traffic impacts, and a majority of those who took our evaluation survey supported making the transit lanes permanent.			

Requisite experience project name #2	22 Filmore Phase I		
Name of Applicant demonstrating requisite experience	SFMTA	Completion Date	7/1/20
Meets ten year requirement?	TRUE		
To address the transportation needs of current and future residents, workers and visitors to 16th Street, community-informed improvements are being implemented on 16th Street, that include transit-only lanes, transit bulbs, new traffic and pedestrian signals, as well as new streetscape amenities. The project was split into two phases – the first phase, from Potrero Avenue to 3rd Street, was completed in summer 2020. The second phase is ongoing and is between Church Street and Potrero Avenue.			

STI Requisite experience for Bridge Housing Corporation - On Site Bike/Ped STI Capital Project

Requisite experience project name #1	Macarthur Project		
Name of Applicant demonstrating requisite experience	Bridge Housing Corporation	Completion Date	7/1/14
Meets ten year requirement?	TRUE		
BRIDGE served as the master developer for the MacArthur Station Master Plan, a mixed-use, mixed-income transit-oriented development, that provided 675 new housing units, as well as commercial, retail and community space. BRIDGE reconstructed the Telegraph/MacArthur traffic signal, and provided new landscaping along the northwest side of MacArthur including curb, gutter, sidewalks, landscaping, irrigation, street signs, and pavement.			

Requisite experience project name #2	Potrero Project		
Name of Applicant demonstrating requisite experience	Bridge Housing Corporation	Completion Date	5/1/21
Meets ten year requirement?	TRUE		
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, etc.,	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
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TRA Requisite experience for 29 Sunset - Transit Related Amenities TRA Capital Project

Requisite experience project name #1	38 Geary & 38 Geary Rapid		
Name of Applicant demonstrating requisite experience	SFMTA	Completion Date	7/1/21
Meets ten year requirement?	TRUE		
Temporary emergency transit lanes were installed along segments of Geary Boulevard in winter 2020-21. Evaluation done in spring 2021 showed that the new transit lanes and other treatments have improved 38 Geary bus performance with minimal traffic impacts, and a majority of those who took our evaluation survey supported making the transit lanes permanent.			

Requisite experience project name #2	22 Filmore Phase I		
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Name of Applicant demonstrating requisite experience		SFMTA	Completion Date	7/1/20
Meets ten year requirement?		TRUE		
To address the transportation needs of current and future residents, workers and visitors to 16th Street, community-informed improvements are being implemented on 16th Street, that include transit-only lanes, transit bulbs, new traffic and pedestrian signals, as well as new streetscape amenities. The project was split into two phases – the first phase, from Potrero Avenue to 3rd Street, was completed in summer 2020. The second phase is ongoing and is between Church Street and Potrero Avenue.				
File Name	Past Exp TRA1, Past Exp TRA2, etc.,	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

PGM requisite experience

Demonstrate prior experience by providing evidence of two prior PGM projects similar to the proposed PGM in scope and size, which have been completed by **the implementing party**

Requisite experience project name #1	San Francisco Tenant Right to Counsel	Operating entity name	Eviction Defense Collaborative
Name of implementing party demonstrating requisite experience	Eviction Defense Collaborative	Completion Date	3/1/23
Meets ten year requirement?			
TRUE			
Free legal services, including full scope legal representation for tenants in an eviction matter, emergency rental assistance, tenant subsidies and advocacy for those facing eviction from City shelters.			
Describe the prior experience of the Program Operator with operating similar successful programs.			
For 27 years, EDC has been the only agency in San Francisco (SF) solely dedicated to eviction prevention, processing 99% of all the eviction notices filed in the city. EDC's service model includes free legal services for eviction defense, rapid emergency rental assistance and subsidies for those at risk of eviction and displacement, and advocacy for unhoused San Franciscans facing eviction from City shelters. Since 2019, EDC has served as the lead partner with the City of San Francisco for the implementation of SF Tenant Right to Counsel (TRC), which guarantees all San Francisco tenants full scope legal representation in an eviction matter. In this role, EDC coordinates and oversees the work of 9 legal service organizations comprising the city-wide TRC system.			

Requisite experience project name #2	Installation Basics Training 200 Program	Development entity name	GRID Alternatives	
Name of implementing party demonstrating requisite experience	GRID Alternatives	Completion Date	1/1/20	
Meets ten year requirement?				
TRUE				
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.				
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.				
File Name	Past Exp PGM1, Past Exp PGM2	Provide documentation for the two recently completed programs.	Uploaded to HCD?	Yes

(13) Applicant(s) certifies that 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.

Yes

(14) Applicant(s) certifies that construction of the Project has not commenced as of the application deadline set forth in the NOFA. Any demolition operation conducted under a written order issued by a state or local governmental agency because a facility is structurally unsound and in danger of imminent collapse is exempt from this requirement.

Yes

(15) Applicant(s) certifies that for TOD and ICP projects, the High Quality Transit or Qualifying Transit, respectively, must be serving the Transit Station/Stop at the time of application submittal. For RIPA projects, the Qualifying Transit must be serving the Transit Station/Stop by the time a certificate of occupancy is provided. For all Project Area Types, the AHD and Qualifying Transit's Transit Station/Stop must be connected by a pedestrian access route no greater than 0.50 miles at the time of certificate of occupancy. Improvements to complete the pedestrian access route between the AHD and the Transit Station/Stop may be included as part of the project STI/TRA components so long as they are completed by the time a certificate of occupancy is provided.

Yes

(16) Applicant(s) certifies to demonstrate consistency with State Relocation Assistance Law (CA Gov Code Sec. 7260-7277).

Yes

Does Project trigger State Relocation Assistance Law (Title 1, GC, Division 7, Chapter 16, commencing at Section 7260, and Title 25 CCR, Subchapter 1, Chapter 6, commencing at Section 6000.)?

No

Provide a narrative explanation, in the box below, **supporting why relocation is not required**. "N/A" or "Vacant Land" is not sufficient.

The AHD project is being built on a parking lot owned by the SFPUC for decades before being sold to the Applicant. The site was operated as overflow parking for many years and there were no commercial or residential tenants historically.

(17) Applicant(s) certifies that 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 under Indian country, are exempt from this requirement. **Projects located on Trust Land, as defined under Indian country, are exempt from this requirement.**

Yes

(A) For the purposes of this section alone, jurisdictions that are undergoing Department review of their housing element at the time of award and jurisdictions which are receiving Department technical assistance to bring their housing element into compliance at the time of award, shall both be deemed to be in a presumptive state of substantial compliance by the Department. All awards premised on presumptive substantial compliance shall include conditions in their respective standard agreements requiring that prior to funds disbursement the subject jurisdiction must have received a final housing element certification letter from the Department.

Is the Project located within a jurisdiction which currently has an adopted housing element in substantial compliance with **Art.10.6 (§65580) Ch. 3 Div. 1 of Title 7 (Gov. Code §65585)**?

Yes

[A jurisdiction's current housing element compliance status is obtainable thru HCD's website.](#)

Please provide date of HCD compliance determination

File Name:	HE Determination letter	Provide HCD's determination letter.	Uploaded to HCD Portal?	Yes
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(18) Applicant(s) certifies that applicants that are a City, County, or City and County must at the time of application, have submitted their housing element annual progress reports as required by Government Code section 65400 to the State of California for the current and prior year.

Yes

Is any of the Applicants for this project, a City, County, or City and County?

Yes

Has the City, County, or City and County submitted their housing element annual progress reports as required by Government Code section 65400 to the State of California for the current and prior year.?

Yes

(19) Applicant(s) certifies that Application/Project must integrate applicable climate adaptation measures as described in Section 107 Narrative Based Policy Scoring (b).

Yes

(20) Applicant(s) certifies 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 California Department of Conservation's Farmland Mapping and Monitoring Program (FMMP) Tool (California Important Farmland Finder). An exemption to the FMMP designation may be allowed for applications that submit documentation that substantiates a description of an Infill Site.

Yes

AHD

Applicant(s) certifies that the **AHD** 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

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

Applicant(s) certifies that the **STI** 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

TRA

Applicant(s) certifies that the **TRA** 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

(21) 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) Applicant(s) certifies that the Rental Affordable Housing Developments must meet the underwriting standards in the UMRs and MHP Guidelines Section 7312.

Yes

(B) Applicant(s) certifies the Affordable Housing Development, Housing Related Infrastructure, or both are infeasible without AHSC Program funds, and other committed funds are not and will not be supplanted by AHSC Program funds.

Yes

(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.

Will the proposed Project involve new construction or Substantial Rehabilitation and requiring the demolition of existing residential units?

No

Will the proposed Project involve 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?

No

(D) If the Affordable Housing Development, Housing Related Infrastructure, or both 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.

Will the proposed Project involve the demolition of existing units that are affordable to lower-income households?

No

- (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.

Applicant(s) certifies to adopt a written non-discrimination policy to comply with all applicable state and federal law, including, without limitation, the requirements of Title VI of the Civil Rights Act of 1964 (42 USC Section 2000d et seq.); the Americans with Disabilities Act of 1990; the Fair Housing Act; the Fair Housing Amendments Act of 1988; the California Fair Employment and Housing Act; the Unruh Civil Rights Act; GC Section 11135; Rehabilitation Act of 1973 Section 504; and all regulations promulgated pursuant to those statutes (including 24 CFR Part 100, 24 CFR Part 8, and 28 CFR Part 35)?

[affirmatively further fair housing](#)

Yes

- (22) Applicants must affirm that the proposed Affordable Housing Development, or Mixed Use Development in the case that non-residential uses are included, are powered entirely through electricity with no connections to natural gas infrastructure. Only zero-emission generators are AHSC Eligible Costs. Projects required to include fossil fuel-based backup power by regulation or code should consider the cleanest and most renewable technology first, starting with gaseous fuel (e.g., RNG, NG, LPG), and then tier 4 compliant diesel. If a fossil fuel-based generator is installed, be advised that procurement, site preparation, installation, or operation of such units is not an AHSC Eligible Cost.

Applicant(s) certifies that the Project will be powered entirely through electricity with no connections to natural gas infrastructure as described above?

Yes

File Name:	All Electric Design	Document affirming that the proposed Affordable Housing Development, or Mixed-Use Development in the case that non-residential uses are included, are powered entirely through electricity with no connections to natural gas infrastructure.	Uploaded to HCD?	Yes
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- (23) Applications requesting AHSC Program funding for Sustainable Transportation Infrastructure, Transportation Related Amenities, or both 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.

Is approval by a local public works department, or other responsible local agency, required for the STI Capital Project?

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
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- (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)(21)(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.

Will the proposed STI/TRA Project involve the demolition of existing residential units?

No

Will the proposed STI/TRA Project involve the demolition of existing units 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?

No

- (24) Applications requesting AHSC Program funding for Program Costs must also demonstrate to the satisfaction of the Department all the following:

- (A) Applicant(s) certifies that the Program Costs are infeasible without AHSC Program funds, and other committed funds are not being supplanted by AHSC Program funds.

Yes

(25) Applicant(s) acknowledges that all proposed AHSC Project components are subject to all applicable codes, including the California Building Standards Code (CCR, Title 24). Yes

(26) Applicant(s) certifies to demonstrate that outreach and education on reducing potential health impacts of air pollution will be provided to residents of Affordable Housing Developments. Yes

BRIDGE Property Management Company (BPMC) will distribute informational fliers to all new residents of 440 Arden Way as part of a welcome packet provided at move-in. These fliers will be modeled on informational materials provided by the American Lung Association and include information on the health impacts of exposure to air pollutants as well as methods to decrease harmful exposure. BPMC will also work with the on-site 3rd party service provider, Lutheran Social Services of Northern California, to provide information and guidance to residents on air quality, health and safety during operations.

(27) Applicant(s) certifies to comply with the Americans with Disabilities Act (ADA), fair housing, nondiscrimination, Pet Friendly Housing Act, physical accessibility, and Violence Against Women Act (VAWA), requirements pursuant to MHP Guidelines Section 7314 (a)-(d). 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 (California Code of Regulations (CCR), Title 4, Section 10337(b)(2), as may be amended and renumbered from time to time). The Applicant or Developer of the Project must ensure that any other applicable federal, state, and local accessibility requirements are met. Yes

(28) Affordable Housing Development and Housing Related Infrastructure components involving new construction, acquisition and Substantial Rehabilitation, or conversion of nonresidential structures to residential, dwelling units must be capable of accommodating broadband internet service with at least a speed of 100 megabits (50 megabits for rural) per second for downloading and 20 megabits (10 megabits for rural) per second for uploading.

(A) Affordable Housing Development and Housing Related Infrastructure components must 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 internet 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 internet infrastructure planning, as well as existing broadband internet service providers in the area.

(C) Applicant(s) certifies to comply with high speed broadband internet service, with speeds listed above must be made available to each Restricted Unit for a minimum of 5 years, free of charge to the tenants, and available within 6 months of the AHD's placed-in-service date. Yes

In addition to the Threshold Requirements above, Applicant(s) acknowledge, understand, and agree to comply with the following sections of the 2023 AHSC Guidelines.

§108 Application Process	Yes
§109 Legal Documents	Yes
§110 Reporting Requirements	Yes
§111 Performance Requirements	Yes
§112 Defaults and Cancellations	Yes

End of Document

Quantitative Policy Scoring – 52 Points Maximum

Total Quantitative Self Score **50.000**

(a) Active Transportation Improvements §107(a) - 14 Points Maximum										14
(1) Length of Context Sensitive Bikeways (PAM) - 3 points maximum STI and TRA Quantification Form										3
(A) 3 points for at least one (1.0) lane mile (B) 1 point for at least one half (0.50) lane mile										
Class 1 Bikeways		Class 2 Bikeways		Class 3 Bikeways	1.000	Class 4 Bikeways		Total Context Sensitive Bikeway Mileage	1.000	
File Name	AHSC-funded STI and TRA Quantification Form			Complete the AHSC-funded STI and TRA Quantification Form identifying the locations, AADT, and Speed Limit of all STI and TRA components that are to be funded by the AHSC program				Uploaded to HCD?	Yes	
Will the Project expand an existing bicycle network? The new Context Sensitive Bikeway funded by AHSC must have an entry point within the Project Area and (2) directly intersect with an existing bikeway as a way to connect to the existing bike network. The existing bikeway and bikeway network does not have to be comprised of Context Sensitive Bikeways. - 2 point maximum										Yes 2
File Name	Bicycle Network Connectivity			Identify at least one location where the new AHSC-funded Context Sensitive Bikeway directly intersects with an existing bikeway on the Project Area Map (PAM).				Uploaded to HCD?	Yes	
(3) Length of AHSC-funded Safe and Accessible Walkways (PAM) - 3 points maximum										3
Total length (in linear feet) of STI new or replaced sidewalks and TRA sidewalks improved:										
(A) 3 points for repairing or constructing sections of sidewalks, walkways, or ramps that create more than 2,000 feet of continuous Safe and Accessible Walkway. (B) 1 point for repairing or constructing sections of sidewalks, walkways, or ramps that create more than 1,000 but at or less than 2,000 feet of continuous Safe and Accessible Walkway.										
Safe and Accessible Walkways - length (in feet) of new or replaced sidewalk, walkways, or ramps									2,500	
(4) New pedestrian facilities - 2 point maximum										
Will the Project create at least 1,000 linear feet of new pedestrian facilities where none exist at the time of application submission?										Yes 2
New sidewalk where none previously existed, please refer to the PAM for more details.										
File Name	Pedestrian Network Gap			PAM - Using the Project Area Map, identify the current gap in the pedestrian network (no path or sidewalk currently exists) of at least 1,000 linear feet that is to be completed by the AHSC program funding.				Uploaded to HCD?	Yes	
(5) Projects that improve existing transit routes that serve the community around the AHD. - 4 points maximum (two points for each strategy).										4
The AHSC-funded improvements must improve service for a transit route that serves at least one (1) stop or station inside the Project Area. The improvement to the transit route need not be wholly inside the Project Area, but the Project's effects to improving reliability and/or speed inside the Project Area should be evident.										
Projects improve a local bus service by at least one (1.0) Lane Mile by implementing any (or a multiple) of the following:										
(A)	At least one (1.0) Lane Mile of a Bus Only Lane that includes prohibition of private vehicles or High Occupancy Toll (HOT) Lanes that are in effect at least eight (8) hours a day, at least five (5) days a week.								No	
(B)	Installation of new off-board fare collection kiosks or machines along all stops for one (1.0) consecutive Lane Mile .								No	
(C)	Installation of new at-grade boarding infrastructure along all stops for one (1.0) consecutive Lane Mile .								No	
(D)	Installation of at least four (4) bus bulb-outs that eliminate the need for buses to pull out of the general flow lane along one bus route in the Project Area .								Yes	
(E)	Installation of new or upgraded Transit Signal Priority hardware and software along all signals for one (1.0) consecutive Lane Mile .								Yes	
(F)	Installation of at least five (5) new bus shelters where none currently exist at least five stops along one bus route in the Project Area .								Yes	
(G)	Procurement of at least one new ZEV transit vehicle that allows the provider to modify published schedules that will achieve headways of 15 minutes or less during peak hours or reduce peak hour existing headways by more than 10 minutes.								No	
File Name	Local Transit Route Improvements			Provide maps and/or scopes of work identifying the proposed locations for the improvements to the local transit route identified in §107(b)(5) along the one transit route. If improving two transit routes, provide one map for each of the routes.				Uploaded to HCD?	Yes	
(b) Green Buildings and Renewable Energy §107(b) - 3 Points Maximum										3
(1) Green Building Status - 3 points										
Construction Type:	Residential Construction									
Green building status beyond State mandatory building code requirements as verified:	LEED Gold									
File Name	Green Building Status			Provide signed letter from a certified LEED Green rater, certified Green Point rater, or licensed engineer stating the commitment to achieve green building status beyond State mandatory building code. Specify the Certification the AHD commits to.				Uploaded to HCD?	Yes	
(c) Housing and Transportation Collaboration §107(c) - 10 Points Maximum										10
(1) STI Funds Requested as percentage of Total AHSC Requested - 6 points maximum										
AHD & HRI Requested:	\$33,000,000	STI Requested:	\$10,217,503	Total AHSC Funds Requested:	\$45,721,399	STI % of Total AHSC Requested:	22%	6		

- (2) Project which invest at least \$1,500,000 or five (5.0%) percent of total AHSC funding request (whichever is the lower amount) in Transportation Related Amenities at or along the side of block face(s) that include a Transit Station or Stop within the Project Area. - **2 points maximum**

TRA Req:	\$1,500,000	TRA (Transit Station or Stop) Requested:	\$1,500,000	Total AHSC Funds Requested:	\$45,721,399	TRA (Transit Station/Stop) Funds Req as % of Total AHSC Req:	3%	TRA % of Total AHSC Requested:	3%	2
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- (3) Projects which provide documentation that their site is: - **2 points maximum**

2

- (A) Within environmentally cleared High Speed Rail Station Planning Area

Is Project Area within environmentally cleared High Speed Rail Station Planning Area? **No**

- (B) Funding the construction of community-identified components:

Has the proposed Project received funds from another California Strategic Growth Council (SGC) Program? **No**

- (C) Utilizing Publicly-Owned Land:

Is Project to be developed on land designated as Excess Land (EO N-06-19) or any land declared surplus by a local agency? Projects developed on land donated by or leased at a discounted rate from a transit agency are also eligible for these points. **Yes**

File Name	Housing and Transportation Collaboration	Provide evidence that the project is either utilizing publicly-owned land, part of a related Strategic Growth Council project, or located within an environmentally cleared High Speed Rail Station Planning Area as identified in Sec.107(c)(3). If utilizing Publicly-Owned Land, provide documentation as requested for each respective type of land as outlined in Section 107 Quantitative Policy Scoring(c)(3)(C).	Uploaded to HCD?	Yes
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- (d) Location Efficiency and Access to Destinations §107(d) - **3 Points Maximum**

3.000

- (2) Location Efficiency to Key Destinations (PAM) - For TOD Project Areas and ICP Project Areas each type of Key Destination is worth one third (0.333) of a point. For RIPA Project Areas each type of Key Destination is worth one half (0.50) of a point. (for each item below, answer Yes or No as to if these Key Destinations are within 1/2 mile of the AHD)

(A) Market or Grocery store (SNAP Retailer)	Yes
(B) Food Bank	Yes
(C) Medical clinic	Yes
(D) Licensed childcare facility	Yes
(E) Pharmacy	Yes
(F) Park accessible to the general public	Yes
(G) Community Center	Yes
(H) Public library	Yes
(I) Public elementary, middle, high school, non-profit university or non-profit junior college	Yes
(J) Bank, or credit union	Yes
(K) Post Office	No

- (e) Funds Committed §107(e) - **4 Points Maximum**

4

Points will be awarded for applications demonstrating committed funding for all permanent financing, grants, project-based rental assistance, and operating subsidies, excluding: the amount requested from the AHSC Program, an allocation of tax-exempt bonds, and 4 percent or 9 percent tax credits.

Does Applicant meet the above requirements? **TRUE**

- (f) Prohousing Designation §107(f) - **3 Points Maximum**

2

- (1) Projects located in jurisdictions that have received a "Prohousing designation" as certified by the Department by the application due date. - **3 Points Maximum**

Is Project located in a jurisdiction that have received a "Prohousing designation" as certified by the Department and by the application due date? **No**

- (2) Projects located in jurisdictions that have applied for a "Prohousing designation" from the Department. - **2 Points Maximum**

Has the jurisdiction of the proposed Project applied for a "Prohousing designation" from the Department? **Yes**

The prohousing application must be received by the Department before the application due date and the jurisdiction must have passed a resolution of their governing body authorizing application and participation in the Prohousing Designation Program, and have at least three of the following policies in place:

(A) Projects located in jurisdictions with policies that involve meaningful actions towards Affirmatively Furthering Fair Housing pursuant to GC Section 8899.50, including, but not limited to, rezoning higher density in Higher Opportunity Areas, prioritizing funding in Higher Opportunity Areas or areas of concentrated poverty or lower opportunity, place-based (e.g., acquisition/rehabilitation, infrastructure improvements, enhancement of community amenities and resources) or displacement strategies in areas of concentrated poverty, lower opportunity or high displacement risk.	No
(B) Projects located in jurisdictions permitting missing middle housing uses (e.g., triplexes and fourplexes) by right in existing low-density, single family residential zones or increasing allowable density in low-density, single-family residential areas beyond the requirements of state Accessory Dwelling Unit Law (e.g., permitting more than one ADU or JADU per single-family lot) and Government Codes sections 65852.21 and 66411.7.	No
(C) Projects located in jurisdictions with density bonus programs which exceed statutory requirements by 10 percent or more.	No
(D) Projects located in jurisdictions that are reducing or eliminating parking requirements for residential development as authorized by GC Sections 65852.2; adopting vehicular parking ratios that are less than the relevant ratio thresholds at subparagraphs (A), (B), and (C) of GC Section 65915, subdivision (p)(1); or adopting maximum parking requirements at or less than ratios pursuant to GC Section 65915, subdivision (p).	Yes
(E) Establishment of ministerial approval processes for a variety of housing types, including single-family and multifamily housing.	No
(F) Establishment of an Enhanced Infrastructure Financing District or similar local financing tool that, to the extent feasible, directly supports housing developments in an area where at least 20 percent of the residences will be affordable to Lower Income households.	No

Balboa Building A (Balboa Gateway) Quantitative Policy Scoring §107 App AHSC0001030

			V1	1/30/23
(G)	Projects located in jurisdictions that zone more sites for residential development or zoning sites at higher densities than is required to accommodate 150 percent of the minimum Regional Housing Needs Allocation for the Lower-Income allocation in the current housing element cycle.		No	
	Projects located in jurisdictions with measures that reduce costs for transportation-related infrastructure or programs that encourage active modes of transportation or other alternatives to automobiles. Qualifying policies include, but are not limited to, publicly funded programs to expand sidewalks or protect bike/micro-mobility lanes; creation of on street parking for bikes; transit-related improvements; or establishment of carshare programs.		No	
	Projects located in jurisdictions that have established pre-approved or prototype plans for missing middle housing types (e.g., duplexes, triplexes, and fourplexes) in low-density, single-family residential areas.		No	
	Establishment of streamlined, program-level CEQA analysis and certification of general plans, community plans, specific plans with accompanying Environmental Impact Reports (EIR), and related documents and Projects located in jurisdictions that have documented practice of streamlining housing development at the Project level, such as by enabling a by-right approval process or by utilizing statutory and categorical exemptions as authorized by applicable law (Pub. Resources Code, Sections 21155.1, 21155.4, 21159.24, 21159.25; Gov. Code, Section 65457; Cal Code Regs., tit. 14, Sections 15303, 15332; Pub. Resources Code, Sections 21094.5, 21099, 21155.2, 21159.28).		Yes	
	(K) Waiver or significant reduction of development impact fees for residential development.		No	
	(L) Establishment of local housing trust funds or collaboration on a regional housing trust fund.		Yes	
	(M) A comprehensive program that complies with the Surplus Land Act (Gov. Code, § 54220 et seq.) and that makes publicly owned land available for affordable housing, or for multifamily housing projects with the highest feasible percentage of units affordable to Lower Income households. A qualifying program may utilize mechanisms such as land donations, land sales with significant write-downs, or below-market land leases.		No	
File Name	Pending Prohousing Designation	Provide evidence that the jurisdiction applied for a "Prohousing designation" from the Department and that the jurisdiction have passed a resolution of their governing body authorizing application and participation in the Prohousing Designation Program.	Uploaded to HCD?	Yes

(g) Anti-Displacement Activities §107(g) - 4 Points Maximum				4
(1) Projects that document a commitment to implement at least one (1) new or expanded Anti-displacement activity listed below, as supported by an assessment of housing needs and displacement vulnerability.				
Please see Guidelines for the "Assessment" and the "Commitment Letter" requirements.			# of Activities to be implemented	1
(A) Projects may select up to two activities listed below. These activities must be implemented by an independent non-profit or locality with dedicated Program Cost (PGM) funding of a minimum \$150,000 per activity:				
(i)	A non-profit and/or Locality developing a Community-Driven, Neighborhood-Scale Anti-Displacement Plan		No	
(ii)	A non-profit and/or Locality implementing a policy or action identified in a previously-adopted Anti-Displacement Plan that is not listed below		No	
(iii)	A non-profit and/or Locality implementing a policy identified in an existing Community-Driven, Neighborhood-Scale Anti-Displacement Plan		No	
(iv)	A non-profit and/or Locality developing or implementing a pipeline or training programs that will build capacity for local affordable housing developers		No	
(v)	A non-profit and/or Locality developing or implementing a process for data collection, monitoring, & tracking systems related to the causes of displacement (e.g. rental property registry, landlord licensing, local eviction tracking, or a speculation watchlist)		No	
(vi)	A non-profit and/or Locality developing or implementing eviction prevention and landlord anti-harassment programs		Yes	
(vii)	A non-profit and/or Locality developing or implementing rental assistance programs		No	
(viii)	A non-profit and/or Locality developing a Neighborhood Leadership Development Program for stakeholders within the project community		No	
(ix)	A non-profit and/or Locality developing or implementing a Small/Family Business Protection Program for community businesses in the Project Area		No	
(x)	A non-profit and/or Locality developing or operating a Community Land Trust or Land Banking activities		No	
File Name	Assessment Housing Needs	Applicants are required to develop an assessment of the housing needs and displacement vulnerability for the communities overlapping the Project Area.	Uploaded to HCD?	Yes
File Name	Commitment Letter workplan	All proposals in partnership with a non-profit or locality must provide a Commitment Letter and a proposed workplan describing how each program or activity will be implemented.	Uploaded to HCD?	Yes
File Name	Assessment Supporting Documents	Optional: Applicants and partners are permitted to provide their own existing Anti-Displacement Assessment, if it addresses the requirements described in Section 107 Quantitative Policy Scoring (g)(1). Applicants and partners are also permitted to provide information or data from reputable local sources, like the locality's Housing Element, to respond to the provided Assessment template prompts. Any alternative assessments or source documentation should be provided.	Uploaded to HCD?	N/A

(h) Local Workforce Development and Hiring Practices Maximum §107(h) - 3 Points				3
(1) Projects that implement workforce development strategies that advance the recruitment, training, and hiring of individuals who live within Priority Population census tracts or Low-Income Households. 1.5 points per strategy				
Choose from the following AHSC workforce development strategies:			# of Strategies	2
(A)	Partnership with a Workforce Development organization or a Workforce Development Board.		Yes	
File Name	Workforce Strategy A	Partnership with a Workforce Development Organization: If pursuing Workforce Strategy A (Section 107 Quantitative Policy Scoring (h)(1)(A)), submit the information and verifiable documentation requested in Section 107 Quantitative Policy Scoring (h)(1)(A)(i)-(vi) in a letter jointly signed by the Applicant and external organization.	Uploaded to HCD?	Yes
(B)	Project is bound by a Skilled and Trained Workforce Commitment.			
(C)	Projects that have developed a Project Labor or Community Workforce Agreement.			
(D)	Projects that are located in jurisdictions with Local Hire Ordinances.		Yes	
File Name	Workforce Strategy D	Local Hire Ordinances: If pursuing Workforce Strategy D (Section 107 Quantitative Policy Scoring (h)(1)(D)), submit the information and verifiable documentation requested in Section 107 Quantitative Policy Scoring (h)(1)(D)(i)-(iii) in a letter.	Uploaded to HCD?	Yes

(i) Housing Affordability §107(i) - 5 Points Maximum				4.00
AHSC R6				

(1) For rental Affordable Housing Developments, the following shall apply:

(A) Applications which restrict a percentage of units in a rental Affordable Housing Development to Extremely Low Income (ELI) households. **3 Points Maximum**

Points will be awarded based on the percent of total units restricted to ELI households as follows:

(i) 15 to 19.9 percent of total units = **1 points**

(ii) 20.0 to 24.9 percent of total units = **2 points**

(iii) 25 percent or more of total units = **3 points**

Extremely Low Income (ELI) Units	40	3.00
Total AHD Units	159	
ELI Units as a % of Total AHD Units	25.16%	

(B) Applications which restrict a percentage of three-bedroom or larger units in a rental Affordable Housing Development to Extremely Low Income or Very Low-Income households. **2 Points Maximum**

(i) 10 to 19.9 percent of total units = **1 points**

(ii) 20 percent or more of total units = **2 points**

Three-bedroom or larger units to Extremely Low Income or Very Low-Income households	20	1.00
Total AHD Units	159	
Three-bedroom or larger, ELI or VLI Units as a % of Total AHD Units	12.58%	

(j) **Programs §107(j) – 3 Points Maximum**

3

Applicants that propose an AHSC-funded Program (PGM) Cost in partnership with a non-profit organization (including churches, Community Based Organizations, or other organization registered as a 501(c)(3) Organization) for at least \$150,000. All proposals in partnership with a non-profit must provide a commitment letter and a proposed workplan describing how each program or activity will be implemented. **An Applicant seeking points for an activity under the Anti- Displacement category is not eligible for additional points for that same activity under the Programs section.**

Please see Guidelines for items that should be included in the proposed workplan:

Programs proposed under this section must fall under one of these four categories to be eligible for points.

Active Transportation Encouragement and Safety: Active Transportation programs that encourage residents to walk or bicycle more frequently and more safety.

(A) Programs may include, but are not limited to: Bike Safety Workshops, Walking School Buses or other group walking activities, Safe Routes to School or Transit. Additionally, distribution of lights, safety equipment, or bicycles to low-income residents are an eligible Program Cost as an incentive for participation in safety education programs

(B) Low-Income Zero Emission Vehicle (ZEV) Car Sharing Programs: Programs that provide free or reduced cost access to Zero Emission Vehicle Car Sharing Programs.

(C) AHD Resident Support: Instructor-led adult educational, health and wellness, or skill building classes. Includes, but is not limited to: Financial literacy, computer training, home-buyer education, GED classes, and resume building classes, ESL, nutrition class, exercise class, health information/awareness, art class, parenting class, on-site food cultivation and preparation classes, and smoking cessation classes. Drop-in computer labs, monitoring or technical assistance shall not qualify.

(D) Tenant Legal Counseling: Programs that provide legal advice and education to renters on their rights as a tenant and access to programs to help reduce risks of evictions and displacement. Section 103(b)(1)(A) applies.

Which, above program, category will the applicant(s) choose from to propose the AHSC-funded Program (PGM)

(C)

Program Name AHD Resident Support

Non-profit organization name BRIDGE Housing

File Name	AHSC funded pgm Commitment letter	If pursuing Section 107 Quantitative Policy Scoring (j), provide a commitment letter and a proposed workplan describing how each program or activity will be implemented. Be sure to identify which category the proposed AHSC-Funded Program falls under. The proposed workplan should include the information outlined in Section 107 Quantitative Policy Scoring (j)(1).	Uploaded to HCD?	Yes
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End of Document

The narrative-based policy scoring section of the application will be scored **only** for projects that meet threshold requirements listed in Section 106.

For Narrative-Based Policy Scoring, applicants must provide responses to the questions and prompts outlined in the Narrative Prompts document. Please reference the Narrative Prompts document and rubric at the SGC AHSC Program Website for instructions, the specific questions to answer, and necessary application materials.

File Name	Narrative	Provide a response to each prompt as outlined in the Narrative Prompts document . The responses must be uploaded as a PDF and must follow the stated word counts. See Narrative Scoring Rubric document for guidance in completing Narratives.	Uploaded to HCD?	Yes
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The following is a summary of each section:

(a) Community Benefits & Engagement §107(a) - 6 Points Maximum

Community involvement and leadership are crucial to ensuring that both the principal objectives and co-benefits of the project respond to the true needs of the community. Taken together, the responses to the prompts will 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 and promotes community health and well-being. **The prompts will ask applicants to address two main components: (1) Community Engagement and Leadership and (2) how the AHSC Project addresses community needs.**

File Name	Community Tracker	Provide a completed AHSC Round 7 Community Engagement Tracker.	Uploaded to HCD?	Yes
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

(b) Climate Adaptation & Community Resiliency §107(b) - 5 Points Maximum

Communities will continue to experience effects of climate change in many ways, including increased likelihood of droughts, flooding, heatwaves, sea level rise, severe weather, and wildfires. Due to these effects, climate resiliency is a key part of planning and project implementation. The prompts will ask applicants to address how the risks posed from climate change and other environmental exposures will be reduced by strategies listed in the Climate Adaptation Assessment Matrix. The prompts will also ask how the Project will reduce the health risks of climate change and other environmental exposures including extreme heat, wildfires and smoke, air pollution from vehicle emissions, and more. Under this section applicants will fill out the Climate Adaptation Assessment Matrix.

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

[State's Adaptation Clearinghouse.](#)

File Name	Climate Matrix	AHSC Round 7 Climate Adaptation Assessment Matrix.	Uploaded to HCD?	Yes
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(c) Collaboration & Planning §107(c) - 4 Points Maximum

Collaboration between local governments and housing and transportation providers is critical to create a project that ensures connectivity and responds to the day to day needs of the community. Taken together, the responses to the prompts of this section should outline how the proposed project brings together the efforts of local government, including housing and transportation agencies to achieve projects that improve efforts related to climate adaptation, health, housing, mobility, and safety. The prompts will ask applicants to address two components of this: (1) Local Planning Efforts and (2) Housing and Transportation Collaboration.

File Name	Local Planning Efforts	Please provide a single PDF with the cover page of the plan and relevant pages of the plans referenced in the Local Planning Efforts Section. Please only include pages referenced in the narrative.	Uploaded to HCD?	Yes
File Name	Site Plan	Provide the most current site plan.	Uploaded to HCD?	Yes
File Name	Future Engagement	Optional: Submit supporting documentation to demonstrate future engagement with either a CBO or residents (i.e. any engagement plans, agreements, etc.). Can be included as part of the Community Needs upload if it is the same CBO.	Uploaded to HCD?	N/A

(d) Equity & Transformation §107(d) - 3 Points Maximum

As stated in the AHSC Program Overview, SGC is committed to achieving racial equity in its operations, investments, and policy initiatives and to achieving its vision that: All people in California live in healthy, thriving, and resilient communities regardless of race ([read more in the SGC Racial Equity Action Plan](#)). The AHSC Program encourages a holistic approach to community development and broader investments in neighborhoods. Under this section, the prompts will ask applicants to describe how the Project: 1) advances equity and 2) is either piloting new or innovative approaches or policies, leveraging existing resources in a new way, or shaping future projects in the nearby communities.

[SGC Racial Equity Action Plan](#)

End of Document

Full list of Uploads

Per answers within
Application

FILE NAME	FILE DESCRIPTION	
HCD Excel Application		
AHSC Application Workbook	AHSC Application Excel Workbook.	Included ✓
Project Overview Sheet/Tab		
Tax Credit Reservation Letter	If the Project has already received a tax credit reservation, upload documentation.	Not Applicable ✗
Operating Subsidy Commitment	Documentation evidencing commitment of Operating Subsidies including source, term (in years), total subsidy amount, and estimated first year allocation.	Not Applicable ✗
Current Contract Rents	Projects proposing project-based rental assistance: Provide documentation of current contract rents for HAP, Shelter Plus or other source, as applicable.	Not Applicable ✗
Tribal Entity Waiver	Modifications or waivers as provided for in HSC Section 50406, subdivision (p) (Assembly Bill 1010 (Chapter 660, Statutes of 2019))	Not Applicable ✗
Indian Country Verification	Documentation verifying land is located in Indian Country as defined by 18 USC 1151.	Not Applicable ✗
Fee or Trust Land Verification	Documentation verifying land is located on Fee or Trust Land.	Not Applicable ✗
STI-TRA Agreement	STI-TRA agreement: If utilizing the experience of a Locality or Transportation Agency non-applicant for STI or TRA components an applicant must 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.	Included ✓
App1 Cert & Legal Disclosure	Reference: Applicant Certification Worksheet.	Included ✓
App1 OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.	Included ✓
App1 Org Chart	Applicant Organization Chart.	Included ✓
App1 Signature Block	Signature Block - upload in Microsoft Word Document.	Included ✓
App1 Cert of Good Standing	Dated 30 days or less from the application due date.	Included ✓
App1 Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).	Included ✓
App2 Cert & Legal Disclosure	Reference: Applicant Certification Worksheet.	Included ✓
App2 OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.	Not Applicable ✗
App2 Org Chart	Applicant Organization Chart.	Not Applicable ✗
App2 Signature Block	Signature Block - upload in Microsoft Word Document.	Included ✓
App2 Cert of Good Standing	Dated 30 days or less from the application due date.	Included ✗
App2 Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).	Included ✗
App3 Cert & Legal Disclosure	Reference: Applicant Certification Worksheet.	Not Applicable ✗
App3 OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.	Not Applicable ✗
App3 Org Chart	See Applicant Documents worksheet.	Not Applicable ✗
App3 Signature Block	See Applicant Documents worksheet.	Not Applicable ✗
App3 Cert of Good Standing	Dated 30 days or less from the application due date.	Not Applicable ✗
App3 Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).	Not Applicable ✗
App4 Cert & Legal Disclosure	Reference: Applicant Certification Worksheet.	Not Applicable ✗
App4 OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.	Not Applicable ✗
App4 Org Chart	Applicant Organization Chart.	Not Applicable ✗
App4 Signature Block	Signature Block - upload in Microsoft Word Document.	Not Applicable ✗
App4 Cert of Good Standing	Dated 30 days or less from the application due date.	Not Applicable ✗
App4 Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).	Not Applicable ✗
Joint Venture Agreement	Executed copy stating the terms of joint venture agreement.	Not Applicable ✗
JV1 Cert & Legal	Reference: Applicant Certification Worksheet.	Not Applicable ✗
JV1 OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.	Not Applicable ✗
JV1 Org Chart	Applicant Organization Chart.	Not Applicable ✗
JV1 Signature Block	Signature Block - upload in Microsoft Word Document.	Not Applicable ✗
JV1 Cert of Good Standing	Dated 30 days or less from the application due date.	Not Applicable ✗
JV1 Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).	Not Applicable ✗
JV2 Cert & Legal	Reference: Applicant Certification Worksheet.	Not Applicable ✗
JV2 OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.	Not Applicable ✗
JV2 Org Chart	Applicant Organization Chart.	Not Applicable ✗
JV2 Signature Block	Signature Block - upload in Microsoft Word Document.	Not Applicable ✗
JV2 Cert of Good Standing	Dated 30 days or less from the application due date.	Not Applicable ✗
JV2 Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).	Not Applicable ✗
Owner Cert & Legal Disclosure	Reference: Applicant Certification Worksheet.	Included ✓
Owner OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.	Included ✓
Owner Org Chart	Owner Organization Chart.	Included ✓
Owner Signature Block	Signature Block - upload in Microsoft Word Document.	Included ✓

Owner Cert of Good Standing	Dated 30 days or less from the application due date.	Included	✓
Owner Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).	Not Applicable	✗
MGP Cert & Legal	Reference: Applicant Certification Worksheet.	Included	✓
MGP OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.	Included	✓
MGP Org Chart	MGP Organization Chart.	Included	✓
MGP Signature Block	Signature Block - upload in Microsoft Word Document.	Included	✓
MGP Cert of Good Standing	Dated 30 days or less from the application due date.	Included	✓
MGP Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).	Not Applicable	✗
AGP1 Cert & Legal	Reference: Applicant Certification Worksheet.	Not Applicable	✗
AGP1 OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.	Not Applicable	✗
AGP1 Org Chart	AGP Organization Chart.	Not Applicable	✗
AGP1 Signature Block	Signature Block - upload in Microsoft Word Document.	Not Applicable	✗
AGP1 Cert of Good Standing	Dated 30 days or less from the application due date.	Not Applicable	✗
AGP1 Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).	Not Applicable	✗
AGP2 Cert & Legal	Reference: Applicant Certification Worksheet.	Not Applicable	✗
AGP2 OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.	Not Applicable	✗
AGP2 Org Chart	AGP Organization Chart.	Not Applicable	✗
AGP2 Signature Block	Signature Block - upload in Microsoft Word Document.	Not Applicable	✗
AGP2 Cert of Good Standing	Dated 30 days or less from the application due date.	Not Applicable	✗
AGP2 Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).	Not Applicable	✗
MLLC Cert & Legal	Reference: Applicant Certification Worksheet.	Not Applicable	✗
MLLC OrgDoc1, OrgDoc2, etc.	Reference: Entity Org Docs Worksheet.	Not Applicable	✗
MLLC Org Chart	Manager of LLC Organization Chart.	Not Applicable	✗
MLLC Signature Block	Signature Block - upload in Microsoft Word Document.	Not Applicable	✗
MLLC Cert of Good Standing	Dated 30 days or less from the application due date.	Not Applicable	✗
MLLC Tax-Exempt Status	Evidence of tax-exempt status from IRS and FTB for Corporations (Non-Profits Only).	Not Applicable	✗
AB1550	Applicable CARB Priority Population Benefit Criteria Tables.	Included	✓
Project Area Map	Items marked with (PAM) in this application must be identified on the Project Area Map (PAM) and as outlined in the Project Area Mapping Guidance. This can include: mapping the Affordable Housing Development, Qualifying Transit, Active Transportation Improvements §107 Quantitative Policy Scoring(a)(1),(2),(3), & (4) ,Location Efficiency and Access to Destinations §107 Quantitative Policy Scoring(d)(1), and GHG Mapping components including: STI Improvements (e.g. bikeways, walkways, STI improvements to transit), traffic calming measures, and key destinations around STI improvements. File must be submitted in a KML/KMZ format.	Included	✓
Transit Service Map	Provide the Published Transit Service Map of the Qualifying Transit line. Indicate the approximate location of the AHD on the map.	Included	✓
Transit Service Schedule	Upload is the service schedule for Qualifying Transit only. All documentation transit service schedule supporting the transit service area. All transit service schedules should be uploaded to "Transit Service Schedule" as one document.	Included	✓
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.	Included	✓
Cap Improvements Req	Documentation from a Locality, transit agency or special district that capital improvements are required.	Not Applicable	✗
Onsite Energy Storage	Documentation certified by an energy consultant or architect.	Not Applicable	✗
STI Cap Project Costs	Documentation showing Capital Project costs are required as a condition of local approval for STI.	Included	✓
TRA Cap Project Costs	Documentation showing Capital Project costs are required as condition of local approval for TRA.	Not Applicable	✗
Utility allowance	Schedule of utility allowances.	Included	✓
Article XXXIV Legal Opinion	Legal opinion regarding Article XXXIV, prepared in accordance with NOFA.	Not Applicable	✗
Article XXXIV Authority	Documentation of Article XXXIV Authority prepared in accordance with NOFA.	Included	✓

Threshold Requirements Sheet/Tab

SCS Consistency Confirmation	Document from MPO identified above confirming consistency with SCS, or alternative planning strategy in non-MPO regions, per §106(a).	Included	✓
SFH Lease Addendum	Submit a draft of the development's Smoke Free Housing lease addendum.	Included	✓
AHD Environmental	Copy of all environmental clearances (e.g. Environmental Impact Report) or Notice of Exemption.	Included	✓
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.	Not Applicable	✗
HRI Environmental	Copy of all environmental reports and clearances (e.g. EIR, Phase 1 Notice of Exemption).	Not Applicable	✗
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.	Not Applicable	✗
STI Environmental	Copy of all environmental clearances (e.g. Environmental Impact Report) or Notice of Exemption.	Included	✓
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.	Included	✓
TRA Environmental	Copy of all environmental clearances (e.g. Environmental Impact Report) or Notice of Exemption.	Included	✓

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.	Not Applicable	✗
AHD-HRI Market Study	Provide a completed market study prepared within one year of the application due date.	Included	✓
EFC AHD HRI1; EFC AHD HRI2; EFC AHD HRI3; etc.	Documentation for the 6 permanent sources, plus Equity Investor if known at time of application.	Included	✓
EFC STI1; EFC STI2; EFC STI3; etc.	Supporting documentation for the 3 non-AHSC STI funding commitments.	Included	✓
EFC TRA1; EFC TRA2; EFC TRA3; etc.	Supporting documentation for the 1 non-AHSC TRA funding commitments.	Included	✓
EFC PGM1; EFC PGM2; EFC PGM3; etc.	Supporting documentation for the 0 non-AHSC PGM funding commitments.	Not Applicable	✗
AHD Site Control	Appropriate documentation to demonstrate the form of site control indicated above.	Included	✓
AHD Preliminary Title Report	PTR, that is no more than 6 months old for the AHD Project.	Included	✓
HRI Site Control	Appropriate documentation to demonstrate the form of site control indicated above.	Not Applicable	✗
STI Site Control	Appropriate documentation to demonstrate the form of site control indicated above.	Included	✓
TRA Site Control	Appropriate documentation to demonstrate the form of site control indicated above.	Included	✓
Past Exp AHD1, Past Exp AHD2	Certificates of Occupancy for two recently completed affordable housing developments.	Included	✓
Past Exp HRI1, Past Exp HRI2	Certificates of Occupancy for two recently completed affordable housing developments.	Not Applicable	✗
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.	Included	✓
Past Exp TRA1, Past Exp TRA2	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.	Not Applicable	✗
Past Exp PGM1, Past Exp PGM2	Provide documentation for the two recently completed programs.	Included	✓
Relocation Plan	Applicants must provide a Relocation Plan.	Not Applicable	✗
HE Determination letter	Provide HCD's determination letter.	Included	✓
AHD No Ag	Demonstrate the AHD site is not within land designated as agricultural land per FMMP tool.	Included	✓
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).	Not Applicable	✗
HRI No Ag	Demonstrate the HRI site is not within land designated as agricultural land per FMMP tool.	Not Applicable	✗
HRI Ag Infill	Applicants seeking an exemption to the FMMP determination must demonstrate that the HRI Project site qualifies as an Infill Site (as defined in Appendix A).	Not Applicable	✗
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.	Not Applicable	✗
All Electric Design	Document affirming that the proposed Affordable Housing Development, or Mixed-Use Development in the case that non-residential uses are included, are powered entirely through electricity with no connections to natural gas infrastructure.	Included	✓
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.	Included	✓

Quantitative Policy Scoring Sheet/Tab

AHSC-funded STI and TRA Quantification Form	Complete the AHSC-funded STI and TRA Quantification Form identifying the locations, AADT, and Speed Limit of all STI and TRA components that are to be funded by the AHSC program funds.	Included	✓
Bicycle Network Connectivity	Identify at least one location where the new AHSC-funded Context Sensitive Bikeway directly intersects with an existing bikeway on the Project Area Map (PAM).	Included	✓
Pedestrian Network Gap	PAM - Using the Project Area Map, identify the current gap in the pedestrian network (no path or sidewalk currently exists) of at least 1,000 linear feet that is to be completed by the AHSC program funding.	Included	✓
Local Transit Route Improvements	Provide maps and/or scopes of work identifying the proposed locations for the improvements to the local transit route identified in §107(b)(5) along the one transit route. If improving two transit routes, provide one map for each of the routes.	Included	✓
Green Building Status	Provide signed letter from a certified LEED Green rater, certified Green Point rater, or licensed engineer stating the commitment to achieve green building status beyond State mandatory building code. Specify the Certification the AHD commits to.	Included	✓
Housing and Transportation Collaboration	Provide evidence that the project is either utilizing publicly-owned land, part of a related Strategic Growth Council project, or located within an environmentally cleared High Speed Rail Station Planning Area as identified in Sec.107(c)(3). If utilizing Publicly-Owned Land, provide documentation as requested for each respective type of land as outlined in Section 107 Quantitative Policy Scoring(c)(3)(C).	Included	✓
Prohousing Designation	Provide certification from the Department (HCD) that the Jurisdiction has received "Prohousing designation"	Not Applicable	✗
Pending Prohousing Designation	Provide evidence that the jurisdiction applied for a "Prohousing designation" from the Department and that the jurisdiction have passed a resolution of their governing body authorizing application and participation in the Prohousing Designation Program.	Included	✓
Assessment Housing Needs	Applicants are required to develop an assessment of the housing needs and displacement vulnerability for the communities overlapping the Project Area.	Included	✓
Commitment Letter workplan	All proposals in partnership with a non-profit or locality must provide a Commitment Letter and a proposed workplan describing how each program or activity will be implemented.	Included	✓

Assessment Supporting Documents	Optional: Applicants and partners are permitted to provide their own existing Anti-Displacement Assessment, if it addresses the requirements described in Section 107 Quantitative Policy Scoring (g)(1). Applicants and partners are also permitted to provide information or data from reputable local sources, like the locality's Housing Element, to respond to the provided Assessment template prompts. Any alternative assessments or source documentation should be provided.	Not Applicable	✗
Workforce Strategy A	Partnership with a Workforce Development Organization: If pursuing Workforce Strategy A (Section 107 Quantitative Policy Scoring (h)(1)(A)), submit the information and verifiable documentation requested in Section 107 Quantitative Policy Scoring (h)(1)(A)(i)-(vi) in a letter jointly signed by the Applicant and external organization.	Included	✓
Workforce Strategy B	Skilled and Trained Workforce Commitment: If pursuing Workforce Strategy B (Section 107 Quantitative Policy Scoring (h)(1)(B)), submit the information and verifiable documentation requested in Section 107 Quantitative Policy Scoring (h)(1)(B)(i) in a letter jointly signed by the Applicant and external organization.	Not Applicable	✗
Workforce Strategy C	Project Labor or Community Workforce Agreement: If pursuing Workforce Strategy C (Section 107 Quantitative Policy Scoring (h)(1)(C)), submit the information and verifiable documentation requested in Section 107 Quantitative Policy Scoring (h)(1)(C)(i) in a letter jointly signed by the Applicant and external organization.	Not Applicable	✗
Workforce Strategy D	Local Hire Ordinances: If pursuing Workforce Strategy D (Section 107 Quantitative Policy Scoring (h)(1)(D)), submit the information and verifiable documentation requested in Section 107 Quantitative Policy Scoring (h)(1)(D)(i)-(iii) in a letter.	Included	✓
AHSC funded pgm Commitment letter	If pursuing Section 107 Quantitative Policy Scoring (j), provide a commitment letter and a proposed workplan describing how each program or activity will be implemented. Be sure to identify which category the proposed AHSC-Funded Program falls under. The proposed workplan should include the information outlined in Section 107 Quantitative Policy Scoring (j)(1).	Included	✓

Narrative-Based Policy Scoring

Narrative	Provide a response to each prompt as outlined in the Narrative Prompts document . The responses must be uploaded as a PDF and must follow the stated word counts. See Narrative Scoring Rubric document for guidance in completing Narratives.	Included	✓
Community Tracker	Provide a completed AHSC Round 7 Community Engagement Tracker.	Included	✓
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.	Included	✓
Climate Matrix	AHSC Round 7 Climate Adaptation Assessment Matrix.	Included	✓
Local Planning Efforts	Please provide a single PDF with the cover page of the plan and relevant pages of the plans referenced in the Local Planning Efforts Section. Please only include pages referenced in the narrative.	Included	✓
Site Plan	Provide the most current site plan.	Included	✓
Future Engagement	Optional: Submit supporting documentation to demonstrate future engagement with either a CBO or residents (i.e. any engagement plans, agreements, etc.). Can be included as part of the Community Needs upload if it is the same CBO.	Not Applicable	✗

Certification & Legal

Cert-Legal Explanation	Letter of explanation for any "Yes" answers or red shaded items above. Copy this sheet and upload separate from the application.	Not Applicable	✗
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CARB GHG & Co-Benefits Quantification

AHSC 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.	Included	✓
GHG Affordable Housing Tab Inputs	Signed letter from housing project developer documenting inputs in the Affordable Housing Tab of the AHSC Benefits Calculator Tool. Follow this link for specific requirements and template.	Included	✓
GHG Transit Tab Inputs	Signed letter from transit agency partner documenting inputs in the Transit Tab of the AHSC Benefits Calculator Tool. Follow this link for specific requirements and template:	Included	If applicable
GHG Solar PV Tab Inputs	Signed letter from licensed professional documenting inputs in the Solar PV Tab of the AHSC Benefits Calculator Tool and PVWatts Calculator results. Follow this link for specific requirements and template.	Included	If applicable
Bike Share Inputs	Signed letter from bike share partner committing to delivering the proposed bike share project and confirming that project specific inputs in the AHSC Benefit Calculator are correct: -Is bike share is electric (yes/no)? -Number of bike share trip per year in Year 1 and Year F -Average cost per trip -Explanation or calculation of how the expected number of trips was derived	Not Applicable	If applicable
Clean Mobility Option (CMO) Benefits Calculator Tool	If applicant is proposing shared mobility projects, submit a completed CMO Benefits Calculator Tool.	Not Applicable	If applicable
GHG Shared Mobility Inputs	Signed letter from shared mobility provider documenting inputs in the Shared Mobility Tab of the AHSC Benefits Calculator Tool. Refer to the documentation requirements in the CMO Benefits Calculator Tool.	Not Applicable	If applicable

END OF DOCUMENT

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Certification & Legal Disclosure

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

Criminal Matters

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

Printed Name	Title of Signatory	Signature	Date

Entity Organizational Documents

Organizational Documents

The following is intended as a brief summary of legal documents commonly required to verify the legal authority of the private entity or entities applying to HCD for an Award of funds and does not apply to public applicants. Documents required to apply for funds (threshold requirements) are legally distinct from those required to enter into a standard agreement or to receive bonus points. For projects receiving an Award of HCD funds, additional documents, or corrections, may be required prior to execution of the Standard Agreement.

Organizational Charts

Complete organizational charts are required for the Sponsor/Recipient, Borrower, MGP and AGP (if different from the Sponsor).

Corporate Entities

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. Certificate of Good Standing must be dated 30 days or less from the application due date.

Limited Liability Companies

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. Certificate of Good Standing must be dated 30 days or less from the application due date.

Limited Partnerships

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**)

Amended and Restated Limited Partnership Agreement

Certificate of Good Standing certified by Secretary of State.

Tribal Entity

Tribe Formation Documents (Constitution, Charters, etc.)

Federal Register of Indian Entities Recognized (81 Fed Reg. 26826) if applicable

BIA Federal Acknowledgment Petitioner List (CFR Section 83.1 of Title 25) if applicable

Contact List maintained by the Native American Heritage Commission (GC Section 65352.3) if applicable

End of Document

Project information needed for the CARB AHSC Benefits Calculator Tool at "Project Info" Worksheet, Cell reference at right if each item below.

Project Name	Balboa Building A (Balboa Gateway)	Cell = E23
HCD Project Application #	AHSC0001030	Cell = E24
Project County	San Francisco	Cell = E25
Project Area Type	Transit Oriented Development (TOD)	Cell = E26
Developer Contact Name	Jeremy Hoffman	Cell = E27
Developer Contact Phone	5105014529	Cell = E28
Developer Contact Email	jhoffman@bridgehousing.com	Cell = E29
AHSC GGRF Funds Requested (\$)	\$45,721,399	Cell = E31
Other GGRF Funds (\$)	no data provided at application	Cell = E32
Other GGRF Funds Sources	no data provided at application	Cell = E33

Project information needed for the CARB AHSC Benefits Calculator Tool at "Affordable Housing Inputs" Worksheet, , Cell reference at right if each item below.

Maximum stories	6	Cell = C20
Total Dwelling Units	159	Cell = C21
Restricted Dwelling Units	157	Cell = C22
Net Density (dwelling units/acre)	201	Cell = C23
Mixed-use Development?	No	Cell = C24
Total Residential Space (square feet)	172,910	Cell = C25
Total Mixed-use Space (square feet)	no data provided at application	Cell = C26
Traffic Calming Measures?	Yes	Cell = C28
Residential Parking Spaces	80	Cell = C39
Unbundled Monthly Parking Income (\$)	no data provided at application	Cell = C40
Dwelling Units Receiving Transit Passes	157	Cell = C45
Annual Transit Passes Value (\$)	\$1,176	Cell = C46
Duration of Funding for Transit Passes (years)	3	Cell = C47

Application Development Team (ADT) Support Form								v1 1/30/23							
Please complete the "yellow" cells in the form below and email a copy to: AppSupport@hcd.ca.gov and AHSC@hcd.ca.gov . A member of the Application Development Team will respond to your request.															
Full Name:						Date Requested:				Application Version Date:		1/30/23			
Organization:					Email:						Contact Phone:				
Issue #	Sheet/Tab name	Section	Cell#	Describe the issue/error or suggestion					Urgency	ADT Status	Status Date				
1															
2															
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6															
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8															
9															
10															

AFFORDABLE HOUSING AND SUSTAINABLE COMMUNITIES PROGRAM

ROUND 7 PROGRAM GUIDELINES



**CALIFORNIA STRATEGIC
GROWTH COUNCIL**



December 15, 2022

Technical Amendment: 12/17/2024

**Please refer to the respective Council meeting materials for
details <https://sgc.ca.gov/meetings-events/council/index.html>**

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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.
- (c) This document will serve as the primary document related to eligibility, scoring, and the application process for Round 7 of the **AHSC Program**. Unless stated in this document, previous versions of AHSC Guidelines, attachments, Quantification Methodologies, Question and Answer (“Q&A”) documents, or personal communications with staff from previous rounds are superseded by this document and no longer in effect for projects applying to Round 7.
- (d) Severability: If any provision of these Guidelines are found to be unlawful, unenforceable, or invalid in whole or in part for any reason, such provisions will be severed without affecting any other provision of this document. The validity and enforceability of the remaining provisions, or portions of those provisions, will not be affected.

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.

The **AHSC Program** supports the Climate-Friendly, Climate-Ready Housing goals as outlined by [Governor Gavin Newsom's letter to CARB dated July 22, 2022](#). AHSC is funding infill projects that are dense, affordable, and located in transit-rich areas to reduce Vehicle Miles Traveled (VMT). **AHSC Projects** also promote carbon neutrality by funding all electric design and green building techniques, **Urban Greening**, and purchase of **Zero Emission Vehicles (ZEV)**.

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

As a part of California Climate Investments, AHSC will use the updated [Disadvantaged Communities](#) (DAC) designation and the updated low-income community and household threshold collectively referred to as [Priority Populations](#) for Round 7. The updated designation includes:

- Census tracts receiving the highest 25 percent of overall scores in [CalEnviroScreen 4.0](#) (1,984 tracts).
- Census tracts lacking overall scores in [CalEnviroScreen 4.0](#) due to data gaps but receiving the highest 5 percent of [CalEnviroScreen 4.0](#) cumulative pollution burden scores (19 tracts).
- Census tracts identified in the 2017 DAC designation as disadvantaged, regardless of their scores in [CalEnviroScreen 4.0](#) (305 tracts).
- Lands under the control of federally recognized Tribes. For purposes of this designation, a Tribe may establish that a particular area of land is under its control even if not represented as such on CalEPA's DAC map and therefore should be considered a DAC by requesting a consultation with the CalEPA Deputy Secretary for Environmental Justice, Tribal Affairs and Border Relations at TribalAffairs@calepa.ca.gov.

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 is based upon the location of their AHSC-funded **Affordable Housing Development**.

Vision for Racial Equity

The California Strategic Growth Council (SGC) is committed to achieving racial equity in its operations, investments, and policy initiatives and to achieving its vision that: All people in California live in healthy, thriving, and resilient communities regardless of race. Read more in the [SGC Racial Equity Action Plan](#).

Figure 1: Affordable Housing and Sustainable Communities (AHSC) Program Overview

Transit Requirements (All Project Areas) (Section 102)

- **Transit Oriented Development (TOD) Project Areas** and **Integrated Connectivity Project Areas (ICP)** 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 2023 and the time of application. **Rural Innovation Project Areas (RIPA)** can include an existing or planned **Transit Station/Stop** as long as it is in place by the time a certificate of occupancy is provided.
- *Note: ICP/RIPA projects that propose addition of High Quality Transit will remain eligible as an ICP/RIPA.*

Required AHSC-Funded Components (Section 102 and Section 103)

- At least fifty (50) percent of **AHSC Program** funds for each **Project** MUST be used for **Affordable Housing** (which includes **Affordable Housing Developments** or **Housing Related Infrastructure** or both); and
- At least one other type of **Eligible Capital Project or Program Cost**

Eligible Capital Projects or Program Costs (Section 103)

Projects must have one of these costs:

- **Affordable Housing Developments (AHD)**
- **Housing Related Infrastructure (HRI)**

AND one of the costs listed below:

- **Sustainable Transportation Infrastructure (STI)**
- **Transportation Related Amenities (TRA)**
- **Programs (PGM)**

Affordable Housing Development Requirements (Section 103)

Affordable Housing Developments may be:

- New construction
- Acquisition and **Substantial Rehabilitation** including preservation of affordable housing at-risk
- Conversion of one or more nonresidential structures to residential dwelling units

Project Awards and Project Area Types (Section 104 and Section 102)

- All **Project Area Types** are subject to the following minimum and maximum award amounts: Maximum: \$50 million (\$35 million for **AHD/HRI**, \$15 million for **STI/TRA/PGM**) Minimum: \$10 million
- **Project Area Types and specific requirements:**
 - **Transit-Oriented Development (TOD) Project Area**
 - **AHD** MUST be served by **High Quality Transit**
 - **Integrated Connectivity Project (ICP) Project Area**
 - **AHD** MUST NOT be served by **High Quality Transit**
 - **Rural Innovation Project Area (RIPA)**
 - **AHD** MUST NOT be served by **High Quality Transit**; and
 - **AHD** MUST be located within a **Rural Area**

Funding Goals and Requirements (Section 108)

- At least 35.0 percent of **NOFA** to **TOD Project Areas**
- At least 35.0 percent of **NOFA** to **ICP Project Areas**
- At least 10.0 percent of **NOFA** to **RIPAs**
- At least one **Project** from an eligible **Tribal Entity**
- At least one **Project** from each geographic area as defined in Sec. 108
- Programmatic Financial Requirements
 - At least 50.0 percent of the **AHSC Program** expenditures shall be for Affordable Housing (Health & Safety Code § 39719(a)(1)(C)); and
 - At least 50.0 percent of **AHSC Program** expenditures must benefit **Disadvantaged Communities (DAC)** (Health & Safety Code § 39719(a)(1)(C)); and
 - At least 5.0 percent of **AHSC Program** expenditures must benefit **Low-Income Communities** ([California Climate Investments Guidelines](#)); and
 - At least 5.0 percent of **AHSC Program** expenditures must benefit **Low-Income Households** or communities outside of but within a half-mile of **Disadvantaged Communities** ([California Climate Investments Guidelines](#))

Article II. Program Requirements and Procedures

Section 102. Eligible Projects

The **AHSC Program** is designed to implement GHG emission reductions through a reduction of vehicle miles traveled (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 requires 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) The **Project Area** is the area which encompasses transit, housing and destinations and is the area in which **Project** funds will be primarily focused. Each **Project Area** must:
 - (1) Be a contiguous area with no greater than a one (1.0) mile radius from any single point inside the parcel of the **Affordable Housing Development**. Projects that are made up of **Scattered Sites** must choose one point in one of the parcels of the applicant's choice.
 - (2) Include at least one **Transit Station/Stop** consistent with the requirements set forth in (c) or (d) below; and
 - (3) Include all AHSC-funded **Sustainable Transportation Improvements** and **Transportation Related Amenities**. AHSC-funded **STI** components (e.g., a bus-only lane, **Transit Signal Priority**, a bikeway, or sidewalk) may extend beyond the boundaries of the **Project Area**, but a pedestrian entrance to the facility must be located inside the **Project Area**. If making an **STI** improvement to a fixed route transit route, there must be a **Transit Station/Stop** of that route within the **Project Area**. If making an **STI** improvement to a **Flexible Transit Service**, the service area must include the **AHD**.
- (b) The **AHSC Program** includes three eligible **Project Area Types**: 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 through mode shift to transit use, bicycling or walking within transit areas, with an emphasis on integrating or developing affordable housing, and with an emphasis on providing benefits to **Disadvantaged Communities** or **Low-Income Communities**. There are several differentiating requirements between each **Project Area Type**, as described below.

- (c) **TOD Project Areas** must demonstrate all the following:
 - (1) Include at least one (1) **Transit Station/Stop** that is served by **High Quality Transit** at the time of application submittal which is located no farther than one-half (0.50) mile from the **Affordable Housing Development** along a pedestrian access route. If the pedestrian access route is not already in place at the time of application, the route must be in place by the time a certificate of occupancy is provided; and

- (2) Include **Capital Projects** or **Program Costs**:
 - (A) At least one of the following: **Affordable Housing Development (AHD)**; **Housing Related Infrastructure (HRI)**; AND
 - (B) At least one of the following: **Sustainable Transportation Infrastructure (STI)**; **Transportation Related Amenities (TRA)**; **Program Costs (PGM)**
- (d) **ICP Project Areas** must demonstrate all the following:
 - (1) Include at least one (1) **Transit Station/Stop** that is served by the **Qualifying Transit** at the time of application submittal which is located no farther than one-half (0.50) mile from the **Affordable Housing Development** along a pedestrian access route. If the pedestrian access route is not already in place at the time of application, the route must be in place by the time a certificate of occupancy is provided; and
 - (2) Does not include a **Transit Station/Stop** that is served by **High Quality Transit** at the time of application submittal which is located within one-half (0.50) mile from the **Affordable Housing Development** along a pedestrian access route; and
 - (3) Include **Capital Projects** or **Program Costs**:
 - (A) At least one of the following: **Affordable Housing Development (AHD)**; **Housing Related Infrastructure (HRI)**; AND
 - (B) At least one of the following: **Sustainable Transportation Infrastructure (STI)**; **Transportation Related Amenities (TRA)**; or **Program Costs (PGM)**
- (e) **RIPAs** must demonstrate all the following:
 - (1) Include at least one (1) existing or planned **Transit Station/Stop** that is served by the **Qualifying Transit** that is located no farther than one-half (0.50) mile from the **Affordable Housing Development** along a pedestrian access route. If the pedestrian access route is not already in place at the time of application, the route and **Transit Station/Stop** must be in place by the time a certificate of occupancy is provided.
 - (2) Meet all the requirements detailed in Section 102(d)(2) and Section 102(d)(3) above; and
 - (3) Must be located within a **Rural Area**, as defined in California Health and Safety Code 50199.21.

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:

- **Affordable Housing Development (AHD)**
- **Housing Related Infrastructure (HRI)**
- **Sustainable Transportation Infrastructure (STI)**
- **Transportation Related Amenities (TRA)**
- **Community Education and Other Program Costs (PGM)**

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 2 below. Note that these are examples and not an exhaustive list. To be considered a stand-alone component under any of the categories, the improvements must meet the guidelines definition of that component (e.g., **STI, TRA, PGM**, etc.):

Figure 2: Eligible Cost Examples

Eligible Cost Examples	AHD/ HRI	STI	TRA	PGM
Construction or Substantial Rehabilitation of affordable housing	X			
Installation of broadband internet trunk line or fixed wireless infrastructure	X			
Installation of on-site energy storage (battery arrays)	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		
Repaving and road reconstruction costs, only for the portion of the roadway where the new or improved walkway and bikeway is installed		X		
Streetscape improvements, including, but not limited to the installation of lighting, signage, or other related amenities that improve the safety or convenience of pedestrians, cyclists, or transit riders, but do not increase capacity for private vehicles			X	
Street crossing enhancements including installation of accessible ramps or pedestrian signals		X		
Installation of traffic calming measures including development of curb extensions, roundabouts, median islands, traffic diverters, chicanes, "road diets," lane narrowing projects		X		
Signage and way-finding markers for pedestrians or transit users		X		
Bike sharing infrastructure and fleet		X		
Signage and striping of a dedicated bus lane		X		
Transit operations for new service or service expansion		X		

Eligible Cost Examples (continued)	AHD /HRI	STI	TRA	PGM
ZEV transit vehicles and charging infrastructure for new service or service expansion		X		
ZEV vehicles and charging infrastructure for use in a car share program that is accessible to the public, and includes reduced costs for low-income participants		X		
Transit related equipment to increase service or reliability		X		
Transit Signal Priority technology systems		X		
Installation of at-grade boarding infrastructure or concrete bus pads at bus stops		X	X	
Transit passenger amenities (e.g., Wi-Fi access, Digital or Integrated Fare Collection)		X	X	
Street furniture (e.g., benches, shade structures, etc.)		X	X	
Development or improvement of transit facilities or stations			X	
Real-time arrival/departure information systems			X	
Development or improvement of shelters or waiting areas at transit station/stops			X	
Transit fare machine purchase or improvements			X	
Publicly accessible bicycle parking or repair kiosks			X	
Bicycle carrying devices on public transit			X	
Station area signage capital improvements			X	
Publicly accessible ZEV Open Network charging infrastructure	X	X	X	
Zero Emission Transit Vehicle (ZEV) Charging Infrastructure	X	X	X	
Energy efficiency and renewable energy capital improvements	X	X	X	
Urban Greening and water efficiency capital improvements	X	X	X	
Pedestrian and bicycle safety education programs				X
Development and implementation of "walking school bus" or "bike train" programs				X
School crossing guard training programs				X
Bicycle and pedestrian safety clinics or bike rodeos				X
Safe Passages Programs				X
Bike sharing program operations				X
ZEV 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 education and support services (e.g., finances, housing, legal, wellness, workforce)				X
Digital or financial literacy programs for AHD residents				X
No-cost broadband internet service for AHD residents				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. Re-syndication of an **Affordable Housing Development** is not an eligible **Capital Project**.
 - c. Conversion of one or more nonresidential structures to residential dwelling units.
- (ii) Be located within one-half (0.50) mile from a **Transit Station/Stop** that meets the **Project Area** transit requirements as defined in Section 102(c) or (d). The one-half (0.50) mile is to be measured from any edge of the **AHD** parcel to the bus stop or pedestrian entrance to a **Transit Station/Stop** along a pedestrian access route. If the route is not already in place at the time of application, the route must be in place by the time a certificate of occupancy is provided. The **STI/TRA** components of the **Project** can fund this improvement. If the pedestrian access route is not clearly demonstrated in the submitted supporting documentation, additional clarification may be requested to substantiate compliance with requirements.
- (iii) Rental and Homeownership **Affordable Housing Developments** must include at least 20 percent of the total residential units as **Affordable Units**. Rental **AHD Projects** must have an overall **Project** average affordability of all **Restricted Units** within the **Project** no greater than 50 percent represented by **Area Median Income (AMI)**. There is no requirement regarding overall **Project** average affordability of all **Restricted Units** for homeownership **AHDs**. 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:
 - a. 10 units @ 40% **AMI** is $10 \times 40 = 400$
 - b. 10 units @ 60% **AMI** is $10 \times 60 = 600$
 - c. $400 + 600 = 1,000$;
 - d. $1,000/20$ total **Restricted Units** = average affordability of 50%.And;

- (iv) The **Affordable Housing Development** must demonstrate a minimum **Net Density** not less than that shown below in Section 103(a)(1)(A)(iv)(a.) or (b.)

*Note: While applicants may choose which **Net Density** formula they wish to use for **Project Eligibility**, Applicants must use the Un-Adjusted Minimum **Net Density** (Figure 3) for quantification of GHG reductions*

- a. For the total number of dwelling units in the project to be used in the calculation of **Net Density**, the **Applicant** may use either the un-adjusted total number of dwelling units in the project (Figure 3) or a number adjusted for unit size as described in Section 103(a)(1)(A)(iv)(b.).

Figure 3: Un-Adjusted Minimum Net Density

Project Area Type	Residential Only Projects	Mixed Use Developments (Floor Area Ratio)
TOD	30 units per acre	> 2.0
ICP	20 units per acre	> 1.5
RIPA	15 units per acre	> 0.75

- b. For the total number of dwelling units in the project to be used in the calculation of **Net Density**, the **Applicant** may use either the un-adjusted total number of dwelling units in the project (Figure 3) or a number adjusted for unit size by multiplying the factors shown below by the total number of units in each unit size category, then summing the resulting products:
- 0 Bedroom = 0.7 factor
 - 1 Bedroom = 0.9 factor
 - 2 Bedroom = 1.5 factor
 - 3 Bedroom = 1.6 factor
 - 4 Bedroom = 1.8 factor
- c. **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 3.
- d. 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 that is not publicly accessible and is completely enclosed for every two residential units. 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 homeownership, or a combination of both;
 - (ii) Consist of a **Scattered Site** constituting a single, integrated **Affordable Housing Development**. Rental **Affordable Housing Developments** on a **Scattered Site** must meet all the requirements set forth by Section 8303(b) of the Uniform Multifamily Regulations (UMRs). For Homeownership **Affordable Housing Developments** on **Scattered Sites**, the individual sites must have a single owner at the time of execution of the AHSC grant agreement;
 - (iii) Include nonresidential uses that are compatible under local zoning.
- (C) **Eligible costs** for **Affordable Housing Development Capital Projects** are limited to:
- (i) Loans for rental **Affordable Housing Development**. Eligible loan costs for a **Housing Development**, as specified in Section 7304 and 7305 of the **MHP** Guidelines.
 - (ii) Grants for homeownership **Affordable Housing Development**. Eligible grant costs as specified in Section 7747 of the [CalHome Guidelines dated November 27, 2019](#). Construction and **Substantial Rehabilitation** work is also an **Eligible Cost**.
 - (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 funding request for the **AHD 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.
- (D) **Affordable Housing Development** and **Housing Related Infrastructure Capital Project Eligible Costs** must comprise *at least* fifty percent (50.0%) of total AHSC funds requested.
- (E) 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 subsection 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. Any **Project** that represents at application as a single **Affordable Housing Development** for scoring purposes, but after receiving an award letter attempts to split its single **Affordable Housing Development** into multiple **Affordable Housing Developments** with separate ownership structures or separate financing structures will be disencumbered as it no longer meets the requirements of AHSC.

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

(A) **Eligible costs for Housing Related Infrastructure Capital Projects** are limited to any of the following:

- (i) Capital improvements required by a **Locality**, transit agency, or special district as a condition to the approval of the **Affordable Housing Development**.
- (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 **HRI 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) Required environmental remediation necessary for the **HRI Capital Project** where the cost of the remediation does not exceed 50 percent of **AHSC Program** grant funds.
- (v) Real property acquisition (not inclusive of the **AHD** site) 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.

- (vi) Impact fees required by local ordinance are eligible for funding only if used for the identified eligible **HRI Capital Project** not to exceed 15 percent of the **AHSC Program** award up to \$300,000.
- (vii) The purchase and installation of on-site energy storage in the form of battery arrays, as certified by an energy consultant or architect.

(B) **Affordable Housing Development and Housing Related Infrastructure Capital Projects** must comprise *at least* fifty percent (50.0%) 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).

STI Capital Projects may extend beyond the boundaries of the **Project Area**, but a pedestrian entrance to the facility must be located inside the **Project Area**. If making an **STI** improvement to a fixed transit route, there must be a **Transit Station/Stop** of that route within the **Project Area**. If making an **STI** improvement to a **Flexible Transit Service**, the service area must include the **AHD**.

- (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 thirty (30.0) 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 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 **STI Capital project** not to exceed 10 percent of the costs associated with the **STI Capital Project**.

- (v) Transit operations expenditures for up to 10 years that directly expand fixed route, flexible and paratransit transit service, by supporting new, restored, or expanded routes and may include wages, fueling, maintenance, and other costs to operate those services.
- (vi) All vehicles purchased using **AHSC Program** funds must be **Zero Emission Vehicles (ZEV)**. Transit types that do not have an approved zero emission passenger locomotive for use, must provide documentation stating so, and purchase vehicles that meet EPA Tier 4 emission standards.
- (vii) Other **STI Capital Project** costs required as a condition of local approval for the **STI 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** that are part of the AHSC funds requested shall not exceed \$15,000,000.
- (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 (e.g., 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 **TRA Capital Project** not to exceed 10 percent of the costs associated with the **TRA Capital Project**.
 - (v) Other **TRA Capital Project** costs required as a condition of local approval for the **TRA 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** that are part of the AHSC funds requested shall not exceed \$15,000,000.
- (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. Access and availability of **Programs** may be limited to **AHD** residents or may be offered to the greater community. Additionally, costs and fees associated with the ongoing provision of broadband internet service, as defined in Section 106, provided free of charge to the **AHD** residents are an eligible **Program Cost**.
 - (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 \$600,000. Costs incurred for required transit passes or cards described in Section 106 (4) will not contribute to this cap.
- (c) Ineligible costs include, but are not limited to, all 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 unrelated to AHSC-funded transit service, including the general transit fleet;
 - (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 associated with fossil fuel-based backup power.

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** is \$50 million with a minimum award of \$10 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:

The initial base loan amount shall be:

- (A) \$150,000 per **Assisted Unit** utilizing 9 percent tax credits;
- (B) \$200,000 per **Assisted Unit** utilizing 4 percent tax credits; or
- (C) \$300,000 per **Assisted Unit** utilizing no tax credit

The base per **Restricted Unit** loan limit is inclusive of all requested **AHD** loan funds and all **Department** loan awards made prior to the application close date. A manager's unit will be considered 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.

Total **Department** loan and grant funding, including all AHSC funds, shall not exceed the following percentages of the total development cost.

- 40 percent for **Projects** utilizing 9 percent tax credits
- 50 percent for **Projects** utilizing 4 percent tax credits
- 80 percent for **Projects** not utilizing tax credits

In calculating percentage of total development cost, total **Department** funding shall be inclusive of both loan and grant awards received at any point in time. Thus, total **Department** funding will include prior loan and grant awards, AHSC awards, and shall also be applicable to future **Department** awards subsequent to any AHSC award. Only the **Department** funding sources listed in Administrative Notice Number: 21-06, are applicable to the percentages of total development cost listed above and the total **Department** funding.

- (3) Unless expressly contradicted by 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 Unit(s)** (subsidy stacking) is permitted, subject to the **Department's** Repeal of Stacking

Prohibition of Multiple Department Funding Sources Memo. Additional limitations on the use of multiple **Department** funding sources may be specified in the **NOFA**. Limits on **Department** funding, including loan or grant funds on a per unit, per project, and/or per **Developer** basis may be further specified in the **NOFA**.

- (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) Eligible costs incurred after the award date are eligible for reimbursement once the Standard Agreement is executed. Costs incurred prior to award are not eligible for reimbursement.
 - (4) For **Housing Related Infrastructure Capital Project** grants:
 - (A) The total **Housing Related Infrastructure Capital Project** grant amount is \$35,000 per residential unit in the proposed **Affordable Housing Development**, or \$50,000 per **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.
 - (5) For homeownership **Affordable Housing Developments** grants:
 - (A) **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.
 - (B) All **Restricted Units** must be made available for sale to qualified **First-time homebuyers**.
 - (C) The maximum grant amount per **Restricted Unit** is 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 of \$200,000 except that the

maximum grant amount per **Restricted Unit** for a given homeownership **AMI** tier shall equal the maximum loan amount per **Restricted Unit** for a given rental **AMI** tier as follows:

- (i) For homeownership **AMI** tier of 55-85%

Homeownership AMI	85%	80%	75%	70%	65%	60%	55%
Rental AMI	45%	40%	35%	30%	25%	20%	15%

- (ii) For homeownership **AMI** tier of 90-120%

Homeownership AMI	120%	115%	110%	105	100%	95%	90%
Rental AMI	80%	75%	70%	65%	60%	55%	50%

- (D) 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 homeownership **Affordable Housing Development**.
- (E) Prior to any disbursement, an affordability covenant will be recorded against the fee interest in the property of the homeownership **Affordable Housing Development**.
- (F) 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.

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 **Tribal Entity** 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 meeting the requirements of UMR 8313.2 may be listed on the **AHSC Program** application in the appropriate, designated fields for listing such a borrower entity.
 - (A) Single purpose entities not meeting the requirements of a special purpose entity pursuant to UMR 8313.2, whether serving as an intermediate entity within the ultimate borrower structure or not, are not **Eligible Applicants**. Such single purpose entities will not be included as a separate party on any **AHSC Program** legal documents, including but not limited to, Standard Agreements, nor are they eligible to be **Recipients** or payees of **AHSC Program** funds.
- (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) All eligible **Applicants** appearing on the application for the **Project** will be held jointly and severally liable for the completion of the **Project** and as such, will each sign all Standard Agreements to the award of AHSC funds.
 - (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 individual **Capital Projects**. 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 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 a 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 equivalent 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** located in a jurisdiction that has fare-based transit must provide at least one (1) transit pass or card to each **Restricted Unit** for at least 3 years. If the transit agency does not provide passes with unlimited rides, 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 pursuant to Section 103(b)(2).
 - (5) **Applicants** of all proposed rental **Affordable Housing Developments** must certify that the development will be smoke free and demonstrate compliance by submitting a draft of the development's **Smoke Free Housing** lease addendum.
 - (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. The grantee is ultimately responsible for the maintenance of the **Urban Greening** features in the **Project**, even if municipal ordinance assigns responsibility for their maintenance to adjacent property owners. **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) 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 Section 106(7) 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.
- (8) Applications must demonstrate that all necessary discretionary local land use approvals, excluding design review, have been granted.
- (9) The application must be sufficiently complete to assess the feasibility of the proposed project and its compliance with **AHSC Program** and application requirements.
- (10) The applicant must demonstrate that the **Project** is financially feasible as evidenced by documentation including, but not limited to, **Enforceable Funding Commitments**, a market study which meets the requirements specified in the **TCAC** Regulations Section 10322(h)(10), 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**.
- (11) The **Eligible Applicant** or **Locality** serving as the **Developer** of a particular component of the **Project** must demonstrate site control of the property on which that **Project** component will be located as set forth at UMR Sections 8303 and 8316 with the additional requirement that the **Applicant** shall maintain site control through the award date.
 - (A) The following shall apply to **Capital Projects**:
 - (i) Where site control is in the name of another entity, the **Applicant** shall provide documentation, in form and substance reasonably satisfactory to the **Department** (e.g., a purchase and sale agreement, an option, a leasehold interest/option, a disposition and development agreement, an exclusive right to negotiate with a public agency for the acquisition of the site), which clearly demonstrates that the **Applicant** has some form of right to acquire or lease the **Project** property.
 - (ii) Where site control will be satisfied by a long-term ground lease, the **Department** will require the execution and recordation of the **Department's** form lease rider at the time of closing, which shall be entered into by and among the ground lessor, the ground lessee, the **Department**, and any other applicable parties. In all cases, the lease rider shall be recorded against the fee interest in the **Project** property.
 - (B) For **Capital Projects** developed in **Indian country**, the following exceptions apply:
 - (i) Where site control is a ground lease, the lease agreement between the **Tribal Entity** and the **Project** owner is for a period not less than 50 years; and

- (ii) An attorney's opinion regarding chain of title and current title status is acceptable in lieu of a title report
- (12) **Applicants** must demonstrate experience by providing evidence of at least two projects that are similar to each proposed AHSC **Capital Project (AHD, HRI, STI, and TRA)** in scope and size, which have been completed by the **Applicant** serving as the **Developer** of that **Project** component, 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, thereby demonstrating that the **Locality** or transportation agency will be serving as the **STI** or **TRA Developer** for that **Capital Project**.
- (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**. Any demolition operation conducted under a written order issued by a state or local governmental agency because a facility is structurally unsound and in danger of imminent collapse is exempt from this requirement.
- (15) For **TOD** and **ICP** projects, the **High Quality Transit** or **Qualifying Transit**, respectively, must be serving the **Transit Station/Stop** at the time of application submittal. For **RIPA** projects, the **Qualifying Transit** must be serving the **Transit Station/Stop** by the time a certificate of occupancy is provided. For all **Project Area Types**, the **AHD** and **Qualifying Transit's Transit Station/Stop** must be connected by a pedestrian access route no greater than 0.50 miles at the time of certificate of occupancy. Improvements to complete the pedestrian access route between the **AHD** and the **Transit Station/Stop** may be included as part of the project **STI/TRA** components so long as they are completed by the time a certificate of occupancy is provided.
- (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 under **Indian country**, are exempt from this requirement.
- (A) For the purposes of this section alone, jurisdictions that are undergoing **Department** review of their housing element at the time of award and jurisdictions which are receiving **Department** technical assistance to bring their housing element into compliance at the time of award, shall both be deemed to be in a presumptive state of substantial compliance by the **Department**. All awards premised on presumptive substantial compliance shall include conditions in their respective standard agreements requiring that prior to funds disbursement the subject jurisdiction must have received a final housing element certification letter from the **Department**.
- (18) **Applicants** that are a City, County, or City and County must at the time of application, have submitted their housing element annual progress reports as required by Government Code section 65400 to the State of California for the current and prior year.
- (19) Applications must integrate applicable climate adaptation measures as described in Section 107 Narrative Based Policy Scoring (b).
- (20) 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 California Department of Conservation's Farmland Mapping and Monitoring Program (FMMP) Tool ([California Important Farmland Finder](#)). An exemption to the FMMP designation may be allowed for applications that submit documentation that substantiates a description of an **Infill Site**.
- (21) 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, Housing Related Infrastructure**, or both 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, Housing Related Infrastructure, or both 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**.
- (22) Applicants must affirm that the proposed **Affordable Housing Development, or Mixed Use Development** in the case that non-residential uses are included, are powered entirely through electricity with no connections to natural gas infrastructure. Only zero-emission generators are AHSC **Eligible Costs**. **Projects** required to include fossil fuel-based backup power by regulation or code should consider the cleanest and most renewable technology first, starting with gaseous fuel (e.g., RNG, NG, LPG), and then tier 4 compliant diesel. If a fossil fuel-based generator is installed, be advised that procurement, site preparation, installation, or operation of such units is not an AHSC **Eligible Cost**.

- (23) Applications requesting **AHSC Program** funding for **Sustainable Transportation Infrastructure, Transportation Related Amenities**, or both 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)(21)(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
- (24) 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.
- (25) All proposed **AHSC Project** components are subject to all applicable codes, including the California Building Standards Code (**CCR**, Title 24).
- (26) The application must demonstrate that outreach and education on reducing potential health impacts of air pollution will be provided to residents of **Affordable Housing Developments**.
- (27) **Affordable Housing Developments** must meet the Americans with Disabilities Act (ADA), fair housing, nondiscrimination, Pet Friendly Housing Act, physical accessibility, and Violence Against Women Act (VAWA), requirements pursuant to **MHP** Guidelines Section 7314 (a)-(d). 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 (California Code of Regulations (**CCR**), Title 4, Section 10337(b)(2), as may be amended and renumbered from time to time). The

- Applicant** or **Developer** of the **Project** must ensure that any other applicable federal, state, and local accessibility requirements are met.
- (28) **Affordable Housing Development** and **Housing Related Infrastructure** components involving new construction, acquisition and **Substantial Rehabilitation**, or conversion of nonresidential structures to residential, dwelling units must be capable of accommodating broadband internet service with at least a speed of 100 megabits (50 megabits for rural) per second for downloading and 20 megabits (10 megabits for rural) per second for uploading.
- (A) **Affordable Housing Development** and **Housing Related Infrastructure** components must 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 internet 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 internet infrastructure planning, as well as existing broadband internet service providers in the area.
- (C) High speed broadband internet service, with speeds listed above must be made available to each **Restricted Unit** for a minimum of 5 years, free of charge to the tenants, and available within 6 months of the **AHD's** placed-in-service date.

Section 107. Scoring Criteria

AHSC Program funds will be allocated through a competitive process, based on the merits of the application to support a sustainable housing development that expands and improves transit, walking, and biking infrastructure, providing 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 broad categories, with additional subcategories, for a total of 100 points. Scoring elements are detailed in Figure 4. It is the intent of the **AHSC Program** to use scoring to differentiate projects for ranking, so it is not expected that any project will score the full 100 points.

Projects will be reviewed and scored only after meeting threshold requirements as detailed in Section 106. Projects that are not scored are not eligible for award. All the scoring criteria will be applied to every **Project**, regardless of the project components present in each specific **Project**.

Figure 4: AHSC Scoring Elements and Criteria

Estimated GHG Reductions Scoring (30 points)

- Transit and Shared Mobility GHG (5 points)
- Project Area GHG (10 points)
- GHG Efficiency (15 points)

Quantitative Policy Scoring (52 points)

- Active Transportation and Transit Improvements (14 points)
- Green Buildings and Renewable Energy (3 points)
- Housing and Transportation Collaboration (10 points)
- Location Efficiency and Access to Destinations (3 points)
- Funds Committed (4 points)
- Prohousing Designation (3 points)
- Anti-Displacement Activities (4 points)
- Local Workforce Development and Hiring Practices (3 points)
- Housing Affordability (5 points)
- Programs (3 points)

Narrative-Based Policy Scoring (18 points)

- Community Benefit & Engagement (6 points)
- Climate Adaptation & Community Resiliency (5 points)
- Collaboration & Planning (4 points)
- Equity & Transformation (3 points)

To receive points related to a specific **Project** component, the **Applicant** must request a portion of the costs through AHSC (e.g., an **Applicant** can only receive points related to an **Affordable Housing Development** when requesting **AHD** or **HRI** funds).

In all scoring categories, it is the responsibility of the **Applicant** to provide accurate, complete, and clear descriptions of their proposed **Project**. The **Department** and **Council** staff will use the required supporting documentation provided in the submitted application to verify claims, and cannot accept, nor rely on, additional or alternate materials provided after the application deadline. Applicants shall not provide intentionally unclear or vague answers

to avoid disclosing relevant or material details of a **Project** and are instead required to be forthcoming in their application and respond clearly in the spirit and intent of the program. The **Department** and **Council** staff reserve the right to withhold all points in any scoring categories if applicant-submitted documentation is determined to be unclear or incomplete. **Project** details not disclosed to the **Department** that are later discovered or disclosed, and which are determined to be inconsistent with the requirements of AHSC, will result in disencumbrance of the awarded funds and negative points, if applicable.

Estimated GHG Emission Reductions – 30 Points Maximum

For this section, applications will be scored on the GHG emission reductions of proposed project components, for a total of 30 points. Applicants are required to adhere to quantification requirements and guidance published by California Air Resources Board (CARB) and SGC regarding GHG emission reduction estimates and should refer to the AHSC Quantification Methodology and the AHSC User Guide available on the CARB CCI Quantification, Benefits, and Reporting Materials webpage.

Applicants should refer to Table 3 of the AHSC User Guide for a complete list of quantifiable project components. The GHG emission reductions attributable to AHSC will be scored in the following GHG categories:

- Transit and Shared Mobility GHG: Transit and shared mobility project component(s) for a maximum of 5 points;
- Project Area GHG: Affordable housing, active transportation, and/or grid-connected solar PV project component(s) for a maximum of 10 points; and
- GHG Efficiency: Total GHG emission reductions per AHSC dollar for a maximum of 15 points

(a) Estimated GHG Emission Reductions Scoring Process:

- (1) Applicants will estimate GHG emission reductions of each quantifiable project component using the most recent AHSC Benefits Calculator Tool, available on the [CARB CCI Quantification, Benefits, and Reporting Materials webpage](#).

(A) Each application requesting GGRF funding must include at least one of the project components listed in Table 3 of the AHSC User Guide. Applications are not required to estimate the benefits of all quantifiable project components. Also note that the AHSC Benefits Calculator Tool will prorate GHG reductions according to the share of GGRF funding from AHSC and other programs. GGRF Funding from other programs should be specified by the applicant in the Project Info Tab and prorated GHG emission reductions will appear in the GHG Summary Tab.

(B) Applications that include a single **ZEV** transit vehicle purchase as a project component, must use AHSC dollars to fund more than 50 percent of the vehicle cost to be eligible for GHG quantification. In the case that multiple **ZEV** 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 funded by AHSC to be eligible for quantification.

(C) Applications quantifying solar PV electricity generation will only receive credit for electricity generation above state code requirements. Applicants should refer to the applicable energy code at the time of project building permit application submittal.

(D) Phased projects should only quantify the project components for the phase seeking AHSC funding in the current application cycle. Previously funded or future phases are not included in the GHG calculation.

- (2) The GHG emission reductions of each application will be ranked from highest to lowest within each GHG category. Each application will be

assigned to one of five bins in ranked order. Each bin will receive an assigned point score as follows:

FIGURE 5. GHG Scoring Categories

GHG Scoring Category	Bin 1	Bin 2	Bin 3	Bin 4	Bin 5
Transit and Shared Mobility GHG	5 points	4 points	3 points	2 points	1 point*
Project Area GHG	10 points	8 points	6 points	4 points	2 points
GHG Efficiency	15 points	12 points	9 points	6 points	3 points

* Note: **Projects** that do not include a transit component or include transit components that result in a net increase in emissions will be placed in Bin 5 but receive 0 points for the Transit and Shared Mobility GHG Category.

- (3) The score of each GHG category will be combined to determine the **Project's** Total GHG Score.
- (4) Please note that while all projects are scored together, independent of **Project Area Type**, **Projects** will only compete within their **Project Area Type** for the first 80 percent of funding available in the **NOFA** per Section 108.

Quantitative Policy Scoring – 52 Points Maximum

(a) **Active Transportation and Transit Improvements – 14 Points Maximum**

- (1) Up to 3 points for the total length (in **Lane Miles**) of AHSC-funded **Context Sensitive Bikeways**. as follows:
 - (A) 3 points for at least one (1.0) lane mile
 - (B) 1 point for at least one half (0.50) lane mile

AHSC funds may be used to install new or improved bikeways, even if they are not a **Context Sensitive Bikeway**; however, points will only be awarded for **Context Sensitive Bikeways**. Improved bikeways must be facility enhancements that allow an upgrade from Class II to Class I or IV; or Class III to a facility that creates dedicated bicycle space (Class I, II, or IV). A project that converts a temporary Class IV bikeway (e.g., paint, plastic bollards, and/or K-rail) to a permanent Class IV bikeway using permanent physical barriers (e.g., poured concrete and/or plantings) is an eligible cost and eligible **Context Sensitive Bikeway**, but would not be eligible for GHG Quantification since it is not a new bikeway.

- (2) 2 points for **Projects** that expand an existing bicycle network. The new **Context Sensitive Bikeway** funded by AHSC must have an entry point within the **Project Area** and directly intersect with an existing bikeway as a way to connect to the existing bike network. The existing bikeway and bikeway network does not have to be comprised of **Context Sensitive Bikeways**.
- (3) Up to 3 points for the length of AHSC-funded **Safe and Accessible Walkways** as follows:

- (A) 3 points for repairing or constructing sections of sidewalks, walkways, or ramps that create more than 2,000 feet of continuous **Safe and Accessible Walkway**.
- (B) 1 point for repairing or constructing sections of sidewalks, walkways, or ramps that create more than 1,000 but at or less than 2,000 feet of continuous **Safe and Accessible Walkway**.

STI improvements that will make walkways safe and accessible (e.g., through new or repaired sidewalks, crosswalks, or curb ramps) 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 definition of **Safe and Accessible Walkway**. Crosswalk improvements, which are eligible **STI** components, can be measured for the crosswalk distance plus the distance of one block face to which it connects, so long as the block face already is or will be a **Safe and Accessible Walkway** at the completion of the project.

- (4) 2 points for **Projects** that create at least 1,000 continuous linear feet of new pedestrian facilities where none exist at the time of application submission. Examples include new overpasses or underpasses, and new Class 1 path or sidewalk where no walkway currently exists so long as these facilities meet the definition of **Safe and Accessible Walkway**. Curb ramps or other wheelchair-accessible entry points are required for any crossings in this new facility but would not be sufficient in and of themselves to be eligible for this point. The **Lane Miles** of one Class I Multi-Use Path cannot be counted to fulfill the distance scoring sections for both the bikeway and walkway scoring sections; applicants may not use the same portion of a Multi-Use Path for both scoring sections.
- (5) Up to 4 points for **Projects** that improve existing transit routes that serve the community around the **AHD**. To qualify for these points, the AHSC-funded improvements must improve service along one transit route that serves at least one (1) stop or station inside the **Project Area**. The improvement to the transit route need not be wholly inside the **Project Area**, but the **Project's** effects to improving reliability and/or speed inside the **Project Area** should be evident.

Projects that improve a local bus route by implementing any (or a multiple) of the following will be eligible for two points for each strategy, up to four points:

- (A) At least one (1.0) **Lane Mile** of a Bus Only Lane that includes prohibition of private vehicles or High Occupancy Toll (HOT) Lanes that are in effect at least eight (8) hours a day, at least five (5) days a week
- (B) Installation of new off-board fare collection kiosks or machines along all stops for one (1.0) consecutive **Lane Mile**
- (C) Installation of new at-grade boarding infrastructure along all stops for one (1.0) consecutive **Lane Mile**

- (D) Installation of at least four (4) bus bulb-outs that eliminate the need for buses to pull out of the general flow lane along one bus route in the **Project Area**
- (E) Installation of new or upgraded **Transit Signal Priority** hardware and software along all signals for one (1.0) consecutive **Lane Mile**
- (F) Installation of at least five (5) new bus shelters where none currently exist at least five stops along one bus route in the **Project Area**
- (G) Procurement of at least one new **ZEV** transit vehicle that allows the provider to modify published schedules that will achieve headways of 15 minutes or less during peak hours or reduce peak hour existing headways by more than 10 minutes

(b) **Green Buildings and Renewable Energy - 3 Points Maximum**

- (1) 3 points will be awarded for **Affordable Housing Developments** that commit to a design that achieves green building status beyond State mandatory building code requirements as certified by the project architect, energy analyst, and/or sustainability consultant. 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

(c) **Housing and Transportation Collaboration - 10 Points Maximum**

- (1) Up to 6 points for applications with an AHSC funds request for **Sustainable Transportation Infrastructure** that comprises at least a certain amount of funds or a percentage of the total AHSC funds request (whichever is the lower amount) as detailed below:

STI Funds Request as an amount or percentage of Total AHSC Funding Request	Points
At least \$3,000,000 or 10.0% of total funding request	2 points
At least \$4,500,000 or 15.0% of total funding request	4 points
At least \$7,500,000 or 25.0% of total funding request	6 points

- (2) 2 points for applications which invest at least \$1,500,000 or five (5.0%) percent of total AHSC funding request (whichever is the lower amount) in **Transportation Related Amenities** at or along the side of block face(s) that include a **Transit Station/Stop** within the **Project Area**.

(3) 2 points for **Projects** which provide documentation that their site is:

- (A) In a High-Speed Rail Planning Area: An **AHD** that is within environmentally cleared California high-speed rail station planning areas; or
- (B) Funding the construction of community-identified components: A **Project** that funds community-identified components from another SGC-funded project, such as Transformative Communities Collaborative (TCC), Sustainable Agricultural Lands Conservation (SALC); or
- (C) Utilizing Publicly-Owned Land: An **AHD** which is to be developed on land designated as Excess Land (EO N-06-19) or any land declared surplus by a local agency. **Projects** developed on land donated by or leased at a discounted rate from a transit agency are also eligible for these points.
 - (i) For excess state-owned property, the **AHD** must be located on a site selected under EO-N-06-19 to enter into a ground lease with the state to create affordable housing on excess state-owned property.
 - (ii) For surplus land owned by a local agency, including transit agencies:
 - a. Land donations made in fee title must be supported by a transfer agreement and demonstrated written conformance with the Surplus Land Act.
 - b. Land donations made as a low-cost, long-term lease must be supported by written conformance with Surplus Land Act, and a Post-Negotiation Notice and Proposed Disposition Summary.

(d) **Location Efficiency and Access to Destinations - 3 Points Maximum**

(1) Up to 3 points will be given for projects that provide the location of existing **Key Destinations** within one-half (0.50) mile of the AHD. For **TOD Project Areas** and **ICP Project Areas** each type of **Key Destination** is worth one third (0.333) of a point. For **RIPA Project Areas** each type of **Key Destination** is worth one half (0.50) of a point. Each **Key Destination** category may only be counted once. Facilities that meet multiple categories (e.g., a Grocery Store with a Pharmacy) may be counted toward multiple categories. Please see definitions and further specifications for each **Key Destination** in Appendix A. Please see Mapping Guidance for how to map and document **Key Destinations**.

- (A) Market or Grocery store (SNAP Retailer)
- (B) Food Bank
- (C) Medical clinic that accepts Medi-Cal payments or offers free medical services to low-income individuals
- (D) Licensed childcare facility as identified by the California Department of Social Services
- (E) Pharmacy

- (F) Park accessible to the general public
- (G) Community Center accessible to the general public
- (H) Public library
- (I) Public elementary, middle, high school, non-profit university or non-profit junior college
- (J) Bank, or credit union
- (K) Post Office

(e) **Funds Committed - 4 Points Maximum**

- (1) 4 points will be awarded for applications demonstrating committed funding for all permanent financing, grants, project-based rental assistance, and operating subsidies, excluding: the amount requested from the **AHSC Program**, an allocation of tax-exempt bonds, and 4 percent or 9 percent tax credits. For **Projects** with bond financing, any applicable permanent lender commitment of bond financing is required for these points. Assistance for capital expenditures will be deemed to be an **Enforceable Funding Commitment** if it has been awarded to the **Project** or if the **Department** approves other evidence that the assistance will be reliably available. Contingencies in commitment documents based upon the receipt of an allocation of tax-exempt bonds, 4 percent tax credits or 9 percent tax credits will not disqualify a source from being counted as committed.

For homeownership **Affordable Housing Developments** only: Construction loans which will be repaid with revenue from the sale of homes to low-income or moderate-income homebuyers will be considered committed funding.

(f) **Prohousing Designation – 3 Points Maximum**

- (1) 3 Points will be awarded for **Projects** located in jurisdictions that have received a “Prohousing designation” as certified by the **Department** by the application due date; OR
- (2) 2 Points will be awarded for **Projects** located in jurisdictions that have applied for a “Prohousing designation” from the **Department**. The prohousing application must be received by the **Department** before the application due date and the jurisdiction must have passed a resolution of their governing body authorizing application and participation in the Prohousing Designation Program, and have at least three of the following policies in place:
 - (A) **Projects** located in jurisdictions with policies that involve meaningful actions towards Affirmatively Furthering Fair Housing pursuant to GC Section 8899.50, including, but not limited to, rezoning higher density in **Higher Opportunity Areas**, prioritizing funding in **Higher Opportunity Areas** or areas of concentrated poverty or lower opportunity, place-based (e.g., acquisition/rehabilitation, infrastructure improvements, enhancement of community amenities and resources) or displacement strategies in areas of concentrated poverty, lower opportunity or high displacement risk.

- (B) **Projects** located in jurisdictions permitting missing middle housing uses (e.g., triplexes and fourplexes) by right in existing low-density, single-family residential zones or increasing allowable density in low-density, single-family residential areas beyond the requirements of state Accessory Dwelling Unit Law (e.g., permitting more than one ADU or JADU per single-family lot) and Government Codes sections 65852.21 and 66411.7.
- (C) **Projects** located in jurisdictions with density bonus programs which exceed statutory requirements by 10 percent or more.
- (D) **Projects** located in jurisdictions that are reducing or eliminating parking requirements for residential development as authorized by GC Sections 65852.2; adopting vehicular parking ratios that are less than the relevant ratio thresholds at subparagraphs (A), (B), and (C) of GC Section 65915, subdivision (p)(1); or adopting maximum parking requirements at or less than ratios pursuant to GC Section 65915, subdivision (p).
- (E) Establishment of ministerial approval processes for a variety of housing types, including single-family and multifamily housing.
- (F) Establishment of an Enhanced Infrastructure Financing District or similar local financing tool that, to the extent feasible, directly supports housing developments in an area where at least 20 percent of the residences will be affordable to Lower Income households.
- (G) **Projects** located in jurisdictions that zone more sites for residential development or zoning sites at higher densities than is required to accommodate 150 percent of the minimum Regional Housing Needs Allocation for the Lower-Income allocation in the current housing element cycle.
- (H) **Projects** located in jurisdictions with measures that reduce costs for transportation-related infrastructure or programs that encourage active modes of transportation or other alternatives to automobiles. Qualifying policies include, but are not limited to, publicly funded programs to expand sidewalks or protect bike/micro-mobility lanes; creation of on-street parking for bikes; transit-related improvements; or establishment of carshare programs.
- (I) **Projects** located in jurisdictions that have established pre-approved or prototype plans for missing middle housing types (e.g., duplexes, triplexes, and fourplexes) in low-density, single-family residential areas.
- (J) Establishment of streamlined, program-level CEQA analysis and certification of general plans, community plans, specific plans with accompanying Environmental Impact Reports (EIR), and related documents and Projects located in jurisdictions that have documented practice of streamlining housing development at the Project level, such as by enabling a by-right approval process or by utilizing statutory and categorical exemptions as authorized by applicable law (Pub.

Resources Code, Sections 21155.1, 21155.4, 21159.24, 21159.25; Gov. Code, Section 65457; Cal Code Regs., tit. 14, Sections 15303, 15332; Pub. Resources Code, Sections 21094.5, 21099, 21155.2, 21159.28).

- (K) Waiver or significant reduction of development impact fees for residential development.
- (L) Establishment of local housing trust funds or collaboration on a regional housing trust fund.
- (M) A comprehensive program that complies with the Surplus Land Act (Gov. Code, § 54220 et seq.) and that makes publicly owned land available for affordable housing, or for multifamily housing projects with the highest feasible percentage of units affordable to Lower Income households. A qualifying program may utilize mechanisms such as land donations, land sales with significant write-downs, or below-market land leases.

(g) **Anti-Displacement Activities - 4 Points Maximum**

- (1) Up to 4 points for Projects that document a commitment to implement at least one (1) new or expanded Anti-displacement activity listed below, as supported by an assessment of housing needs and displacement vulnerability.

Assessment: **Applicants** are required to develop an assessment of the housing needs and displacement vulnerability for the communities overlapping the **Project Area**. The assessment should describe housing needs and displacement vulnerability using the most recent economic statistics and demographic information available (U.S. Census or other more recently-collected local information is acceptable). The assessment should provide details summarizing adopted and proposed policies and programs related to displacement as publicly-identified in the jurisdiction's Housing Element, other government policies, or any non-governmental organization's Anti-Displacement work. The assessment may be an existing document that meets the goals stated above or the **Applicant** can use the prompts found in Anti-displacement Attachment.

Commitment Letter: All proposals in partnership with a non-profit or **Locality** must provide a Commitment Letter and a proposed workplan describing how each program or activity will be implemented. The following items should be included in the proposed workplan: 1) Proposed Scope of Work by task; 2) Budget by task; 3) Deliverables by task; 4) Proposed implementation timeline; 5) Current status of work, if applicable; 6) Current status of the role the non-profit plays in the **Project Area**; 7) Proposed measures of success & tracking protocols; and 8) Signatures from all implementing parties agreeing to the terms above.

- (A) **Projects** may select any activity listed below. These activities must be implemented by an independent non-profit or **Locality** with

dedicated **Program Cost (PGM)** funding of a minimum \$150,000 per activity:

- (i) A non-profit and/or **Locality** developing a Community-Driven, Neighborhood-Scale Anti-Displacement Plan
- (ii) A non-profit and/or **Locality** implementing a policy or action identified in a previously-adopted Anti-Displacement Plan that is not listed below
- (iii) A non-profit and/or **Locality** implementing a policy identified in an existing Community-Driven, Neighborhood-Scale Anti-Displacement Plan
- (iv) A non-profit and/or **Locality** developing or implementing a pipeline or training programs that will build capacity for local affordable housing developers
- (v) A non-profit and/or **Locality** developing or implementing a process for data collection, monitoring, & tracking systems related to the causes of displacement (e.g. rental property registry, inventory of at-risk units, landlord licensing, local eviction tracking, or a speculation watchlist)
- (vi) A non-profit and/or **Locality** developing or implementing foreclosure or eviction prevention and landlord anti-harassment programs
- (vii) A non-profit and/or **Locality** developing or implementing rental assistance programs
- (viii) A non-profit and/or **Locality** developing a Neighborhood Leadership Development Program for stakeholders within the project community
- (ix) A non-profit and/or **Locality** developing or implementing a Small/Family Business Protection Program for community businesses in the Project Area
- (x) A non-profit and/or **Locality** developing or operating a Community Land Trust or Land Banking activities

(h) **Local Workforce Development and Hiring Practices - 3 Points Maximum**

- (1) Up to 3 points (1.5 points per strategy) for **Projects** that implement workforce development strategies that advance the recruitment, training, and hiring of individuals who live within **Priority Population** census tracts or **Low-Income Households**. Strategies should aim to connect these populations with training and hiring opportunities created by the **Project**. Workforce development strategies may be implemented during project construction or after completion of the project, but they must be implemented within the contract reporting period. Choose from the following AHSC workforce development strategies:

- (A) **Partnership with a Workforce Development organization or a Workforce Development Board:** Applicants must provide the following information and verifiable documentation in a letter jointly signed by the **Applicant** and the external organization:

- (i) The name(s) of the organization(s)
 - (ii) The nature of the partnership between the **Applicant** and the organization
 - (iii) Demonstrate that the implementing organization has a track record of success serving disadvantaged populations, and,
 - (iv) Demonstrate that the implementing organization has a history of success in job placement rates for trainees from **Disadvantaged Communities**
 - (v) The written agreement that details the partnership strategy or policy undertaken and its outcomes
 - (vi) The number and the demographic composition (race, education, and income) of participants in the external organization over the last three (3) years, for each of the following:
 - a. Participants who enrolled in the program;
 - b. Participants who completed the program; and
 - c. Participants who were successfully placed into state-certified apprenticeship or related job
- (B) **Project is bound by a Skilled and Trained Workforce Commitment:** **Applicants** must provide the following information and verifiable documentation in a letter jointly signed by the **Applicant** and the external organization:
- (i) A letter of intent between the **Developer** and the state-certified apprenticeship program including the mechanism to deliver on the term of that commitment
 - (ii) The number and the demographic composition (race, education, income) of participants in the external organization over the last three (3) years, for each of the following:
 - a. Participants who enrolled in the program;
 - b. Participants who completed the program; and
 - c. Participants who were successfully placed into a state-certified apprenticeship or related job
- (C) **Projects that have developed a Project Labor or Community Workforce Agreement:** **Applicants** must provide the following information and verifiable documentation in a letter jointly signed by the **Applicant** and the external organization
- (i) Documentation of the agreements, including, a Targeted Hiring Plan, as defined in in HSC 38599.10, demonstrating how the applicant will:
 - a. Create jobs for residents of under-resourced, tribal, and **Low-income Communities** in the same region as the proposed project
 - b. Ensure access for the aforementioned residents to those jobs

- c. Create a defined cohort of pre-apprentices from local programs with close and demonstrable connections to state-certified apprenticeships
- (D) **Projects that are located in jurisdictions with Local Hire Ordinances: Applicants** must provide the following information and verifiable documentation in a letter:
 - (i) Date the ordinance took effect
 - (ii) Documentation of the ordinance's requirements,
 - (iii) Confirmation the **Project** will be subject to and comply with the ordinance's requirements that including:
 - a. A specific number of targeted workers or apprenticeships to be hired;
 - b. The mechanism for targeting the workers or apprenticeships; and
 - c. The programs from which workers or apprenticeships will be recruited from
- (i) **Housing Affordability - 5 Points Maximum**
 - (1) For rental **Affordable Housing Developments**, the following shall apply:
 - (A) Up to 3 points will be awarded for applications which restrict a percentage of units in a rental **Affordable Housing Development** to Extremely Low Income (ELI) households. Points will be awarded based on the percent of total units restricted to ELI households as follows:
 - (i) 15 to 19.9 percent of total units = 1 points
 - (ii) 20.0 to 24.9 percent of total units = 2 points
 - (iii) 25 percent or more of total units = 3 points
 - (B) Up to 2 points will be awarded for applications which restrict a percentage of three-bedroom or larger units in a rental **Affordable Housing Development** to Extremely Low Income or Very Low-Income households. Points will be awarded based on the percent of total units restricted to three-bedroom or larger at ELI or Very Low-Income households as follows:
 - (i) 10 to 19.9 percent of total units = 1 points
 - (ii) 20 percent or more of total units = 2 points
 - (2) For homeownership **Affordable Housing Developments** the following shall apply:
 - (A) Up to 5 points will be awarded for applications which restrict a percentage of units in a homeownership **Affordable Housing Development to Low-Income (LI) households**. Points will be awarded based on the percent of total units restricted to LI households as follows:
 - (i) 20 to 29.9 percent of total units = 2 points
 - (ii) 30 to 39.9 percent of total units = 3 points
 - (iii) 40 to 49.9 percent of total units = 4 points
 - (iv) 50 percent or more of total units = 5 points

(j) **Programs – 3 Points Maximum**

- (1) 3 points will be awarded to applicants that propose an AHSC-funded **Program (PGM) Cost** in partnership with a non-profit organization (including churches, Community Based Organizations, or other organization registered as a 501(c)(3) Organization) for at least \$150,000. All proposals in partnership with a non-profit must provide a commitment letter and a proposed workplan describing how each program or activity will be implemented. An **Applicant** seeking points for an activity under the Anti-Displacement category is not eligible for additional points for that same activity under the **Programs** section.

The following items should be included in the proposed workplan: 1) Proposed Scope of Work by task; 2) Budget by task; 3) Deliverables by task; 4) Proposed implementation timeline; 5) Current status of work, if applicable; 6) Current status of the role the non-profit plays in the **Project Area**; 7) Proposed measures of success & tracking protocols; and 8) Signatures from all implementing parties agreeing to the terms above

Note: Not all eligible costs identified as **Program (PGM) Costs** in Section 103 will fully satisfy this scoring criteria. Programs proposed under this section must fall under one of these four categories to be eligible for points.

- (A) **Active Transportation** Encouragement and Safety: **Active Transportation** programs that encourage residents to walk or bicycle more frequently and more safety. Programs may include, but are not limited to: Bike Safety Workshops, Walking School Buses or other group walking activities, Safe Routes to School or Transit. Additionally, distribution of lights, safety equipment, or bicycles to low-income residents are an eligible **Program Cost** as an incentive for participation in safety education programs
- (B) Low-Income **Zero Emission Vehicle (ZEV)** Car Sharing Programs: Programs that provide free or reduced cost access to **Zero Emission Vehicle** Car Sharing Programs.
- (C) **AHD Resident Support**: Instructor-led adult educational, health and wellness, or skill building classes. Includes, but is not limited to: Financial literacy, computer training, home-buyer education, GED classes, and resume building classes, ESL, nutrition class, exercise class, health information/awareness, art class, parenting class, on-site food cultivation and preparation classes, and smoking cessation classes. Drop-in computer labs, monitoring or technical assistance shall not qualify.
- (D) **Tenant Legal Counseling**: Programs that provide legal advice and education to renters on their rights as a tenant and access to programs to help reduce risks of evictions and displacement. Section 103(b)(1)(A) applies.

Narrative Based Policy Scoring – 18 Points Maximum

The narrative-based policy scoring section of the application will be scored only for projects that meet threshold requirements listed in Section 106. For Narrative-Based Policy Scoring, applicants must provide responses to the questions and prompts outlined in the Narrative Prompts document. Please reference the Narrative Prompts document and rubric at the SGC **AHSC Program** Website for instructions, the specific questions to answer, and necessary application materials. The following is a summary of each section:

(a) **Community Benefits & Engagement - 6 Points Maximum:**

Community involvement and leadership are crucial to ensuring that both the principal objectives and co-benefits of the project respond to the true needs of the community. Taken together, the responses to the prompts will 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 and promotes community health and well-being. The prompts will ask applicants to address two main components: (1) Community Engagement and Leadership and (2) how the AHSC **Project** addresses community needs.

(b) **Climate Adaptation & Community Resiliency - 5 Points Maximum**

Communities will continue to experience effects of climate change in many ways, including increased likelihood of droughts, flooding, heatwaves, sea level rise, severe weather, and wildfires. Due to these effects, climate resiliency is a key part of planning and project implementation. The prompts will ask applicants to address how the risks posed from climate change and other environmental exposures will be reduced by strategies listed in the Climate Adaptation Assessment Matrix. The prompts will also ask how the **Project** will reduce the health risks of climate change and other environmental exposures including extreme heat, wildfires and smoke, air pollution from vehicle emissions, and more. Under this section applicants will fill out the Climate Adaptation Assessment Matrix.

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](#).*

(c) **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 the day to day needs of the community. Taken together, the responses to the prompts of this section should outline how the proposed project brings together the efforts of local government, including housing and transportation agencies to achieve projects that improve efforts related to climate adaptation, health, housing, mobility, and safety. The prompts will ask applicants to address two components of this: (1) Local Planning Efforts and (2) Housing and Transportation Collaboration.

(d) **Equity & Transformation – 3 Points Maximum**

As stated in the **AHSC Program** Overview, SGC is committed to achieving racial equity in its operations, investments, and policy initiatives and to achieving its vision that: All people in California live in healthy, thriving, and resilient communities regardless of race (read more in the [SGC Racial Equity Action Plan](#)). The **AHSC Program** encourages a holistic approach to community development and broader investments in neighborhoods. Under this section, the prompts will ask applicants to describe how the **Project**: 1) advances equity and 2) is either piloting new or innovative approaches or policies, leveraging existing resources in a new way, or shaping future projects in the nearby communities.

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.
- (b) The **Department** will schedule optional pre-application consultations as detailed in the **NOFA** to provide assistance to applicants regarding minimum threshold eligibility and other requirements.
- (c) Applications will be made available through the **Department**, and complete applications and supporting documentation must be submitted to the **Department** by the deadline detailed in the **NOFA**. An application workbook will be developed by SGC and the **Department** in accordance with these Guidelines, and will outline the required documentation and methods by which compliance with the Guidelines is demonstrated.
- (d) The **Department** may elect to not evaluate compliance with some or all threshold requirements for applications that are not within a fundable range.
- (e) Applications will be reviewed, and negative points assessed, consistent with the **Department's** Negative Points Policy. The Negative Points Policy, Administrative Notice Number 2022-01 dated March 30, 2022, and as [published on the Department's website](#), is hereby incorporated by this reference to these Guidelines as if set in full herein and shall apply with equal force as all other provisions set forth herein.
- (f) 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**.
- (g) Applications will be treated in accordance with Public Records Act. Certain information, in accordance with the Public Records Act, may be publicly disclosed.
- (h) 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**. If there are insufficient **Projects** that have scored 70 points or more, the **Council** may make adjustments in this procedure to meet the following objectives:
 - (1) **Project Area Type** funding goals: The goals are as follows:
 - (A) At least thirty-five (35.0) percent of funds as designated in the **NOFA** to **TOD Project Area** applications;
 - (B) At least thirty-five (35.0) percent of funds as designated in the **NOFA** to **ICP Project Areas** applications;
 - (C) At least ten (10.0) percent of funds as designated in the **NOFA** to **RIPA** applications; and
 - (D) **Remaining Funds**: After designating funds to **Projects** that meet the **Project Area Type** funding targets, remaining available funds may be awarded to any eligible **Project Area Type** that meets the goals detailed below.

- (2) **Geographic Goal:** The **Council** strives to achieve a diverse distribution of resources and recognizes that in order to meet the State's environmental commitments, GHG emission reductions must be made in all parts of the State. The **Council** will use **Remaining 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, with a minimum of one (1) per geographic area to be awarded.

The **AHSC Program** defines the eight geographic areas as follows (listed by geographic area followed by counties pertaining to each area):

- (A) Central Coast: Monterey, San Benito, San Luis Obispo, Santa Barbara, Santa Cruz, Ventura
 - (B) Coastal Southern California: Los Angeles, Orange
 - (C) Inland Southern California: Imperial, Riverside, San Bernardino
 - (D) 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
 - (E) Sacramento Area: El Dorado, Placer, Sacramento, Sutter, Yolo, Yuba
 - (F) San Diego Area: San Diego
 - (G) San Francisco Bay Area: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, Sonoma
 - (H) San Joaquin Valley: Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus, Tulare
- (3) **Tribal Entity Goal:** Regardless of **Project Area Type**, and to the extent qualifying **Projects** are received, the **Council** will seek to fund one project per funding cycle to a **Tribal Entity**. To be considered for the Tribal funding target, a **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 involvement of a **Tribal Entity** is as an applicant for **Program Costs**, the **Project** will not be considered for the Tribal funding target. The **Project** must meet the requirements laid out in Appendix B to qualify for the Tribal funding target. Unless stated otherwise, the **Project** must meet all **AHSC Program** requirements. If multiple **Tribal Entities** apply for **Projects** but are not awarded through the **Project Area Types** goals, the **Council** will apply the scoring criteria from these Guidelines to rank the **Projects** and may take into consideration the level of Tribal involvement and leadership in a **Project** before awarding the **Project** that will meet the Council's Tribal target. Any remaining **Project(s)** involving a **Tribal Entity** will compete for the **Remaining Funds** along with all other projects.
- (4) **Priority Populations Statutory Requirement:** At least fifty (50.0) percent of **AHSC Program** expenditure for **Projects** must benefit **Disadvantaged Communities**. In addition to this requirement, **AHSC Program** funds must be spent in accordance with the goals for **Low-Income Communities** as identified

in the CARB [Funding Guidelines for Agencies Administering California Climate Investments](#). **Projects' Disadvantaged Community and Low-Income Community** status are based upon the location of their AHSC-funded **Affordable Housing Development**.

- (5) Affordable Housing Statutory Requirement: At least fifty (50.0) percent of the annual proceeds appropriated for the **AHSC Program** shall be expended for **Affordable Housing Development(s)**. For the purposes of this set-aside, expenditures related to **Affordable Housing Development** and **Housing Related Infrastructure Capital Projects** shall count toward this requirement.
- (6) A single **Project** may count toward any or all the requirements and targets in Section 108(h)(1)-(5).
- (7) After all the requirements and targets in Section 108(h)(1)-(5) are achieved, any **Remaining Funds** will be awarded to the highest scoring applications. In the event of two or more applications have the same final score, the **Project** with the total highest GHG reductions (MTCO₂e), after appeals and verification, will take precedence.
- (8) To the extent applications received are insufficient to meet any of the targets detailed above, the **Council** reserves the right to waive these targets at their discretion.
- (i) The following additional policies will inform the final decision of **Project** awards:
 - (1) A single **AHD Developer** may not be awarded more than \$100 million per **NOFA** funding cycle, however this limitation may be waived if necessary to meet AHSC statutory funding set-asides.
 - (2) **Projects** will not be partially funded. At the discretion of the **Council**, a **Project** that received a lower score may be awarded funding if the **Remaining Funds** are sufficient to fully fund the **Project**. If funds remain after awards, those funds will roll forward into the next **NOFA**.
 - (3) To support implementation of an applicable SCS and consistency with activities or strategies identified in a regional SCS, or equivalent planning document that demonstrates per capita reductions 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.

Article III. Legal and Reporting Requirements

Section 109. Legal Documents

- (a) **Affordable Housing Developments:** Upon the award of **AHSC Program** funds to assist an **Affordable Housing Development**, the **Department** shall enter into one or more agreements with the applicant, one of which will 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 or grant 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 compliance with California's Relocation Assistance Law (Gov. Code, Section 7260 et seq.) and the implementing regulations adopted by the **Department** (Cal. Code Regs., tit. 25, Section 6000 et seq.), or to the extent applicable, compliance with federal Uniform Relocation Act requirements;
 - (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 Project** 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;
 - (15) Provisions identifying the modification or waiver of state housing finance requirements for **Tribal Entities** pursuant to Appendix B, if applicable;
 - (16) Provisions expressly providing that all awards of **Department** loan or grant funding made to the **Project**, or to any component or components of the **Project**, are cross-defaulted to one another such that:
 - (A) Compliance with all **Department** funding awards to the **Project** is a prerequisite of funding any of the **Department** funding awards; and
 - (B) A default on any one award of **Department** funding constitutes a default of all other **Department** funding awards made to the **Project**;
 - (17) Provisions expressly providing that if any **Project** components (**AHD, HRI, STI, TRA, or PGM**, as applicable) are not timely completed pursuant to **AHSC Program** requirements, the **Project** will no longer qualify for the **AHSC Program** award, and the award will be disencumbered; and
 - (18) Any of the **Department's** standard contractual terms that may be applicable.
- (b) For rental **Affordable Housing Developments**, the **Department** shall enter into a **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 7325;
 - (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 loans and grants approval imposed by the **Department**;
 - (12) "Operations," **MHP** Guidelines Sections 7322 through 7327, shall apply to rental **Affordable Housing Developments** assisted by the **AHSC Program**;
 - (13) Provisions expressly providing that all awards of **Department** loan or grant funding made to the **Project**, or to any component or components of the **Project**, are cross-defaulted to one another such that:
 - (A) Compliance with all **Department** funding awards to the **Project** is a prerequisite of funding any of the **Department** funding awards, and
 - (B) A default on any one award of the **Department** funding constitutes a default of all other **Department** funding awards made to the **Project**.
 - (14) Provisions governing income from commercial uses pursuant to **MHP** Guidelines 7326, 7304(b)(8), and 7304(c); and
 - (15) Other provisions necessary to assure compliance with the requirements of the **AHSC Program**.
- (c) For homeownership **Affordable Housing Developments**, the **Department** shall enter into a **Regulatory Agreement** with the applicant 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 homebuyer selection procedures;
 - (3) Requirements for a subsequent regulatory agreement to be recorded on each individual home when sold to an individual homebuyer;
 - (4) Provisions related to the purchase price of **Restricted Units**;
 - (5) Description of the conditions constituting breach of the **Regulatory Agreement** and remedies available to the parties thereto;
 - (6) Provisions governing use and operation of non-Restricted Units and common areas to the extent necessary to ensure compliance with **AHSC Program** requirements;
 - (7) Special conditions of loans and grants approval imposed by the **Department**;
 - (8) Provisions expressly providing that all awards of **Department** loan or grant funding made to the **Project**, or to any component or components of the **Project**, are cross-defaulted to one another such that:
 - (A) Compliance with all **Department** funding awards to the **Project** is a prerequisite of funding any of the **Department** funding awards, and
 - (B) A default on any one award of the **Department** funding constitutes a default of all other **Department** funding awards made to the **Project**.

- (9) Other provisions necessary to assure compliance with the requirements of the **AHSC Program**.
- (d) 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.
- (e) Grants shall be governed by one or more agreements, which may be in the form a State of California Standard Agreement or other agreement with the **Recipient** in a form prescribed by the **Department**. The agreement or agreements shall ensure that the provisions of these Guidelines are applicable to the **Project** covered by the agreement and enforceable by the **Department**. The agreement or agreements 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 **Project** 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;
- (15) Provisions expressly providing that all awards of **Department** loan or grant funding made to the **Project**, or to any component or components of the **Project**, are cross-defaulted to one another such that:
 - (A) Compliance with all **Department** funding awards to the **Project**, is a prerequisite of funding any of the **Department** funding awards; and
 - (B) A default on any one award of **Department** funding constitutes a default of all other **Department** funding awards made to the **Project**;
- (16) Provisions expressly providing that if any **Project** components (**AHD, HRI, STI, TRA, or PGM**) are not timely completed pursuant to **AHSC Program** requirements, the **Project** will no longer qualify for the AHSC award, and the award will be disencumbered; and
- (17) 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 Article 5. Operations and any additional reporting requirements developed by the **Department**, the **Council** or **CARB**. 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) **Recipients** are required to submit an estimate of the number 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.
 - (A) **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 **Recipients** to clarify what the jobs reporting process may look like.
 - (B) **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.
 - (C) **Recipients** must report annually on all jobs created from the date the standard agreement is executed and continues until the following milestones are reached.
 - (i) Grant Standard Agreement: all funds are disbursed
 - (ii) Loan Standard Agreement: The **AHD** converts to permanent financing
 - (D) **Recipients** must specify jobs created by the **AHSC Program** 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 [CARB CCI Quantification, Benefits, and Reporting Materials webpage](#).

- (E) **Recipients** must ensure that all subcontractors receiving \$100,000 or more, **AHSC Program** funds or otherwise, from the **Recipient** must report on jobs created by the **Project**. Reporting must be completed using the AHSC Jobs Reporting Template provided by CARB.
- (F) Reporting will be done according to both trade and classification to include the following:
 - (i) Job education required*
 - (ii) Job experience required*
 - (iii) Job training credentials*
 - (iv) Number of jobs provided*, **
 - (v) Total project work hours*, **
 - (vi) Average hourly wage*, **
 - (vii) Total number of workers that completed job training*, **
 - (viii) Employer paid health insurance provided*
 - (ix) Paid leave*
 - (x) Retirement plan*
 - (i) Targeted hiring strategy
- (3) Consistent with the *2018 Funding Guidelines for Agencies that Administer California Climate Investments*, **Recipients** must report on all outcomes resulting from the AHSC **Projects**. This includes metrics related to **AHD, HRI, STI, and TRA Projects**. Reporting will include the following components and other metrics as requested, for a duration of no more than five (5) years:
 - (A) **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
 - (B) **STI and TRA transit Project** metrics: Average daily ridership of transit
 - (C) **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.
- (d) Reporting requirements listed in this section are **Eligible Costs** under **Employment Benefits and Outcomes Reporting** for each **Capital Project** or **Program Cost** as described in Section 103.

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** within the time set forth in the Standard Agreement but not later than two years from date of award letter.
 - (1) **Recipients** may request an extension 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. Only one extension to the requirements of this section may be granted.
- (b) The housing units developed in the **Affordable Housing Development** that is a **Capital Project** must be completed, as evidenced by receipt of a certificate of occupancy not later than five years from date of award letter.
 - (1) **Recipients** may request an extension 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. Only one extension to the requirements of this section 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 not apply for **AHSC Program** funds in a subsequent **NOFA** for the same **Project** if it is already funded by a prior award of **AHSC Program** funds.
- (e) Negative points will be assessed against the **AHD Developer** consistent with the **Department's** Negative Points Policy. The Negative Points Policy, Administrative Notice Number 2022-01 dated March 30, 2022, and as published on the **Department's** website, is hereby incorporated by this reference to these Program Guidelines as if set forth in full herein and shall apply with equal force as all other provisions set forth herein.
- (f) In addition to Section 111(a) through (e), **Affordable Housing Development** award **Recipients** will be subject to the **Department's** Disencumbrance Policy. The Disencumbrance Policy, Administrative Notice Number 2022-22 dated March 30, 2022, and as published on the **Department's** website, is hereby incorporated by this reference to these **AHSC Program** Guidelines as if set forth in full herein and shall apply with equal force as all other provisions set forth herein.

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, but not limited to, the following:
 - (1) The **Department** may accelerate all amounts, including outstanding principal and interest, due under the loan and demand immediate repayment thereof. Upon a failure to repay such accelerated amounts in full, the **Department** may proceed with a foreclosure in accordance with the provisions of the deed of trust and state law regarding foreclosures.
 - (2) 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.
 - (3) The **Department** may seek such other remedies as may be available under the relevant agreement or any law.
 - (4) In the event the **Project** is or has been awarded additional **Department** funding, any and all such funding will be cross defaulted to and among one another in the respective loan or, where applicable, grant documents. A default under one source of **Departmental** funding shall be default under any and all other sources of **Department** funding in the **Project**.
- (b) If the breach or violation involves charging tenants rent or other charges in excess of those permitted under the **Regulatory Agreement**, the **Department** may demand the return of such excess rents or other charges to the respective households. In any action to enforce the provisions of the **Regulatory Agreement**, the **Department** may seek, as an additional remedy, the repayment of such overcharges.
- (c) 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) There has been a material change, not approved by the **Department**, in the **Project** or the principals or management of the **Developer** or **Project**;
 - (3) 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
 - (4) Funding conditions have not been or cannot be fulfilled within required time periods
- (d) 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

“Accessible Housing Unit(s)” refers collectively to “Housing Units with Mobility Features” and “Housing Units with Hearing/Vision Features” as defined below

- 1) A “Housing Unit with Mobility Features” means and refers to a housing unit that is located on an accessible route and complies with the requirements of the Code of Federal Regulations (CFR) 24 Section 8.22 and all applicable provisions of Uniform Federal Accessibility Standards (UFAS) or the comparable provisions of the Alternative Accessibility Standard, including but not limited to Sections 809.2 through 809.4 of the 2010 Standards for Accessible Design. A Housing Unit with Mobility Features can be approached, entered, and used by persons with mobility disabilities, including individuals who use wheelchairs. Such units must also comply with CBC 11B.
- 2) A “Housing Unit with Hearing/Vision Features” means and refers to a housing unit that complies with 24 CFR Section 8.22, and all applicable provisions of UFAS or the comparable provisions of the Alternative Accessibility Standard, including but not limited to Section 809.5 of the 2010 Standards for Accessible Design. Such units must also comply with the California Building Code (CBC) 11B.

“Active Transportation” means 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: design and construction of capital improvements (construction) that will improve safety and convenience of people who are biking, walking, or using non-motorized mobility devices. These infrastructure projects may include bikeways, paths, sidewalks, crosswalks, crossing beacons or signals, curb ramps, curb extensions and other similar facilities. Traffic Calming devices such as roundabouts, lane narrowing, lane reductions, or other facilities focused on vehicles speed and volume reductions may be considered Active Transportation infrastructure if installed in tandem with facilities dedicated to biking or walking.

“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. Program that seek funding for distribution of safety gear or bicycles should use the Caltrans Active Transportation Program Guidelines as a reference for when and how distribution is acceptable.

“Activity Delivery Costs” means staff costs incurred by the Public Agency Recipient that are directly related to implementing specific **Capital Projects** and **Program Costs**. They may include costs such as project document preparation, project underwriting, construction management, inspections, or reporting to the **Department**.

“Affordable Housing Development” or “AHD” means a **Capital Project** of residential development or the residential portion of a **mixed-use development** in which at least 20 percent of the total units are **Affordable Units**.

“Affordable Unit” means a housing unit that is made available at an affordable rent, as defined in Health and Safety Code Section 50053, to a household earning no more than 60 percent of the **Area Median Income (AMI)**. For homeownership projects, it means a housing unit that is made available at an affordable housing cost, as defined in Health and Safety Code Section 50052.5, to a household earning no more than 120 percent of the **AMI**. Rental Units shall be subject to a recorded covenant ensuring affordability for a duration of at least 55 years. Homeownership units shall initially be sold to and occupied by a qualified household and shall be subject to a recorded covenant that includes either a resale restriction for at least 30 years or equity sharing upon resale.

“Agricultural Land” means all categories of farmland in the California Department of Conservation’s Farmland Mapping and Monitoring Program (FMMP) tool ([California Important Farmland Finder](#)) including: Prime Farmland, Farmland of Statewide Importance, Unique Farmland, Farmland of Local Importance, Farmland of Local Potential, Irrigated Farmland, Nonirrigated Farmland, and Grazing land.

“AHSC Program” means the program as outlined by these Program Guidelines.

“Alternative Accessibility Standard” also referred to as the HUD Deeming Notice (HUD-2014-0042-0001), means the alternative accessibility standard for accessibility set out in HUD’s notice at 79 Fed. Reg. 29671 (May 23, 2014), when used in conjunction with the requirements of 24CFR pt. 8, 24 CFR Section 8.22, and the requirements of 28 CFR pt. 35, including 28 CFR Section 35.151 and the 2010 Standards for Accessible Design as defined in 28 CFR Section 35.104.

“Applicant” has a meaning set forth in Section 105 in these Program Guidelines.

“Area Median Income” or “AMI” means the most recent applicable county median family income published by the **TCAC**. For **Tribal Entity** applicants, if United States Department of Housing and Urban Development’s (HUD’s) income for a county/parish located within a Tribal Entity’s service area is lower than the United States median, the **Tribal Entity** may use the United States median income limit.

“Assisted Unit” means a unit that is subject to the Program’s regulatory and/or occupancy restrictions as a result of the financial assistance provided by the Program, as specified in the **Regulatory Agreement**.

“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 projects must meet all of the following criteria:

- 1) Operates along a dedicated right of way for at least two (2.0) **Lane Miles** along its route. Dedicated Right of Way (ROW) means that private motor vehicles are prohibited from use of the lane except for turns, parking, and/or the use of variable pricing High Occupancy Toll (HOT) Lanes.
- 2) All vehicles serving the route are equipped with **Transit Signal Priority (TSP)**
- 3) Has peak period minimum frequencies of 12 minutes or less

“Bus Service” means regularly scheduled public transit service operating with limited stops using a fixed route.

"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**.

"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 ¹		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		
	>10,000	Class IV	Class IV	Class IV	
Rural Areas (Developing Corridors)	<2,500	15-20	25-30	35-45	> 45
	2,500-5,000	Standard Shoulder (may be designated as a Class III facility) ²			
	5,000-10,000				
	>10,000				
Rural Main Streets	<2,500	15-20	25-30	35-45	> 45
	2,500-5,000	Standard Shoulder or Shared Lane	Class II	Class II	Class I or IV
	5,000-10,000				
	>10,000	Class II		Class I, II, or IV	

- 1) **Projects** may consider either the design year or post-**Project** implementation conditions for posted speed and Annual Average Daily Traffic (AADT).
- 2) Class I multi-use or bicycle paths are considered **Context Sensitive Bikeways** at any AADT and posted speed.
- 3) For the purposes of **AHSC Program** scoring and GHG quantification, a Class III bikeway must be often referred to as a 'Bicycle Boulevard.' A Bicycle Boulevard is more than just shared lane markings. A Bicycle Boulevard must combine all the following traffic calming measures: signs, pavement markings, speed and volume management measures, and infrastructure for safe and convenient crossings of busy arterials (5,000+ AADT or more).
- 4) For **AHSC Program** 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**.
- 5) For **AHSC Program** scoring purposes and GHG Quantification, bikeways should be measured using **Lane Miles**

"Council" means the California Strategic Growth Council, established pursuant to Public Resources Code Section 75121.

"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.

"Department" means the California Department of Housing and Community Development.

“Developer” means the entity that the **Department** and the **Council** rely upon for experience, site control, and capacity, and which controls (1) the **Affordable Housing Development** during development and through occupancy or the **Housing Related Infrastructure** during development and through completion, (2) the **Sustainable Transportation Infrastructure** during development and through operation, or (3) the **Transit-Related Amenities** during development and through Operation.

“Disadvantaged Community” (DAC) means:

- 1) Census tracts receiving the highest 25 percent of overall scores in CalEnviroScreen 4.0 (1,984 tracts).
- 2) Census tracts lacking overall scores in CalEnviroScreen 4.0 due to data gaps, but receiving the highest 5 percent of CalEnviroScreen 4.0 cumulative pollution burden scores (19 tracts).
- 3) Census tracts identified in the 2017 DAC designation as disadvantaged, regardless of their scores in CalEnviroScreen 4.0 (307 tracts).
- 4) Lands under the control of federally recognized Tribes. For purposes of this designation, a Tribe may establish that a particular area of land is under its control even if not represented as such on CalEPA's DAC map and therefore should be considered a DAC by requesting a consultation with the CalEPA Deputy Secretary for Environmental Justice, Tribal Affairs and Border Relations at TribalAffairs@calepa.ca.gov.

“Employment Benefits and Outcome Reporting” means activities undertaken by **Local Agencies** and **Recipients** to coordinate and monitor the development of **Capital Projects** and **Programs** funded by the **AHSC Program** award as well as 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.

“Enforceable Funding Commitment” or “EFC” means a letter or other document evidencing, to the satisfaction of the **Department**, a commitment of funds or a reservation of funds by a project funding source for construction or permanent financing, including, but not limited to, the following:

- 1) Private financing from a lender other than a mortgage broker, the **Applicant**, or an entity with an identity of interest with the **Applicant**, unless the **Applicant** is a lending institution actively and regularly engaged in residential lending;
- 2) Deferred-payment financing, residual receipts payment financing, grants, and subsidies from public agencies;
- 3) Funds awarded by another **Department** program. Proof of award must be issued prior to final rating and ranking of the Program application;
- 4) 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.
- 5) 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. A below market lease that meets the requirements of UMR section 8316 would be considered a land donation (\$1 per year).

- 6) 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.
- 7) For homeownership **Affordable Housing Developments** only: Construction loans which will be repaid with revenue from the sale of homes to low- or moderate-income homebuyers.
- 8) 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.

"First-time homebuyer" is defined as a borrower who has not had an ownership interest in any principal residence or resided in the home owned by a spouse during the previous three years.

"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.

"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.

"Greenhouse Gas Reduction" (GHG Reduction) means actions designed to reduce emissions of one or all the following gases: carbon dioxide, methane, nitrous oxide, hydrofluorocarbons, perfluorocarbons, and sulfur hexafluoride.

“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.

“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, in the same direction, of every 15 minutes or less (e.g., every departure is not more than 15 minutes from the last) and service seven days a week. This level of service must have been publicly posted by the provider at some point between January 2022 and the time of application.
- 2) Permanent Infrastructure: High Quality Transit must operate on a railway or meet the definition of **Bus Rapid Transit**.

“Higher Opportunity Areas” means neighborhoods of opportunity, with high-performing school, greater availability of jobs that afford entry to the middle class, and convenient access to transit and services. Such areas are defined as ‘high’ or ‘highest’ resources areas in the [2022 TCAC/HCD Opportunity Map](#).

“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. or a capital infrastructure improvement allowed under Section 103(a)(2)(A).

“Indian Country” means (i) all land located in “Indian country” as defined by 18 U.S. Code (USC) 1151; (ii) all land within the limits of a Rancheria under the jurisdiction of the United States Government; (iii) all land held in trust by the United States for an Indian tribe or individual; and (iv) all land held by an Indian tribe or individual subject to a restriction by the United States against alienation.

“Infill Site” means a site that has been previously developed or at least three of four sides or 75 percent of the perimeter of the site adjoins parcels that are currently developed with qualified **Urban Uses**. Perimeters bordering navigable bodies of water and improved parks shall not be included in this calculation. 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 with a charter recorded with the State of California, OR
- 2) 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.
- 3) Applications from **Tribal Entities** may request an exemption to the requirement to be located within an urbanized area or urban cluster

“Innovative Transit” means a broad category transportation services that includes on-demand shuttles and circulators, paratransit services, and private sector transit solutions commonly referred to as “microtransit.” The innovative transit service must be demand-responsive (routes and/or frequency of service are determined dynamically

based on customer demand) and capable of serving multiple riders simultaneously (not only a single rider service).

“Integrated Connectivity Project (ICP) Project Area” means a **Project Area** which includes at least one (1) **Transit Station/Stop** that is served by **Qualifying Transit**, but not **High Quality Transit** as defined in Section 102.

“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.

“Joint Venture” means a partnership between applicants that meets the definition as set forth by **Multifamily Housing Program (MHP)** Guidelines, Appendix A.

“Key Destinations” means vital community amenities and resources. The specification of each Key Destination is listed below in (1-10). Key Destinations must be operational at the time of application. For scattered site projects, applicants should identify distance of Key Destinations around the single point identified for the **Project Area Map**.

- 1) Grocery store: either a full-service grocery store or neighborhood market that is listed on the U.S. Department of Agriculture (USDA) as a SNAP Retail Locator tool
- 2) Food bank: A distribution site for a food bank that is managed by a non-profit that distributes free food at least once a week on a publicly advertised schedule
- 3) Medical clinic: a medical clinic that accepts Medi-Cal payments or has an equally comprehensive subsidy program for low-income patients
- 4) Licensed childcare facility: infant center, school age childcare center, childcare center, childcare center preschool, family childcare home (small), family childcare home (large) as licensed by the Department of Social Services.
- 5) Pharmacy
- 6) Public Park: An open space accessible by the general public managed by a public agency. A public park shall not include 1) school grounds unless there is a bona fide, formal joint use agreement between the jurisdiction responsible for the parks/recreational facilities and the school district or private school providing availability to the general public of the school grounds and/or facilities, 2) greenbelts or pocket parks, or 3) open space preserves or biking parkways unless there is a trailhead or designated access point within the specified distance.
- 7) Community or Recreation Center accessible to the general public and managed by a public agency
- 8) Public library: must be a book-lending public library that also allows for inter-branch lending (when in a multi-branch system)
- 9) Public elementary, middle, high school (which includes public charter schools as indicated by the California Department of Education) and non-profit university or non-profit junior college
- 10) Bank or credit union: Must include on-site staff
- 11) Post Office: United States Postal Service (USPS) Post Office location as indicated by the USPS Locator tool

“Lane Mile” means the total length of roadway or bikeway taking number of lanes into account. For scoring, consistency and reporting purposes, applicants are required to describe all bikeways and busways using lane miles. As an example, a project that installs a bikeway in only one direction along one mile of roadway would be considered having installed one lane mile. If the bikeway is bidirectional or on both sides of the roadway for one mile, the project would be considered having installed two lane miles (one mile each way).

“Locality” means a California city, unincorporated area within a county, or a city and county.

“Lower Income” has the meaning set forth in Health and Safety Code Section 50079.5, households with gross incomes not exceeding 80 percent of **Area Median Income**.

“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. For **Tribal Entities**, if the HUD income for a county/parish located within a **Tribal Entity**’s service area is lower than the State Income Limits, the United States median income limit may be used in determining a Low-Income Community.

“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.

“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.

“Moderate Income” has the meaning set forth in Health and Safety Code Section 50093.

“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 March 30, 2022, as amended.

“Natural Infrastructure” means improvements that result in 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 the **AHSC Program** 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.

“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 septic system requirements and public dedications of land which are for public streets, public sidewalks, public Open Space, and public drainage facilities. Non-allowed deductible areas include utility easements, setbacks, private drives and walkways, general landscaping, common areas and facilities, off street parking, and traditional drainage facilities exclusive to a development project. Mitigations required for development will not be included in the allowed deductible areas.

“NOFA” means a Notice of Funding Availability issued by the Department.

“Peak Hours” or “Peak Period” means the periods 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.

“Principal” means employees of the **Developer** who are in a position responsible for the oversight and management of development activities.

“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.

“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.

“Program Operator” means the entity that administers the day-to-day operational responsibilities for the program for which the **AHSC Program** funding is sought.

“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**.

“Project Area” means the one (1.0) mile radius from a single point inside the parcel of the **AHD**. The point may be chosen anywhere inside of the **AHD** parcel and should be used and referenced consistently through all application materials, in mapping and calculation of distances. If a **Project** is a **Scattered Site Project**, then the applicant may choose which parcel they wish to use.

“Project Area Type” means one of the three categories of **Projects** funded by the **AHSC Program**. Project Area Types are decided based on two main factors: The **AHD** proximity to **High Quality Transit** or **Qualifying Transit** and if the **AHD Project** is located in a **Rural Area**. **Project Area Types** are used to improve distribution of funds to a diverse type of communities throughout California.

“Public Agency” means a **Locality**, transit agency, public housing authority or redevelopment successor agency.

“Qualifying Transit” means a transit line serving the public that 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 2022 and the time of application.

Flexible Transit Service is exempt from these **Peak Hours** frequency requirements. The Transit service must be 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

“Rail Service” means regularly scheduled public transit service running on rails or railways.

“Recipient” means the eligible **applicant** receiving a commitment of **AHSC Program** funds.

“Regulatory Agreement” as set forth by UMR 8301(o).

“Restricted Units” as set forth by UMR 8301(q) for rental **Affordable Housing Developments** or the same as “Affordable Unit” for homeownership **Affordable Housing Developments**.

“Remaining Funds” means the funds available for **Project** awards after the **Project Area Type** Targets are met. These funds are to be used primarily for funding projects to achieve the statutory and **Council**-identified priorities of Geographic and **Tribal Entity** Targets.

“Rural Area” means the definition in [Health and Safety Code 50199.21](#)

“Rural Innovation Project Area (RIPA)” means a **Project** that meets the definition of **Integrated Connectivity Project** and is located within a **Rural Area**.

“Safe and Accessible Walkway” means a pedestrian corridor that meets or exceeds accessibility design standards in Caltrans Design Information Bulletin (DIB) 82-06.

“Scattered Site” means an **AHD Project** in which the parcels of land are not contiguous except for the interposition of a road, street, stream or similar interposition.

- 1) For acquisition and/or rehabilitation projects with one pre-existing project-based Section 8 contract in effect for all the sites, there shall be no limit on the number or proximity of sites.
- 2) For acquisition and/or rehabilitation projects with any of the following:
 - a. Existing federal or state rental assistance or operating subsidies,
 - b. An existing CTCAC Regulatory Agreement, or
 - c. An existing regulatory agreement with a federal, state, or local public entity, the number of sites shall be limited to five, unless the Executive

Director approves a higher number, and all sites shall be either within the boundaries of the same city, within a 10-mile diameter circle in the same county, or within the same county if no location is within a city having a population of five-hundred thousand (500,000) or more.

- 3) For new construction projects and all other acquisition and/or rehabilitation projects, the number of sites shall be limited to five, and all sites shall be within a one (1.0) mile diameter circle within the same county.

“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.

“Site Control” means the applicant or Developer has control of property as set forth in UMR Sections 8303 and 8316 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 AHSC Program requirements. Where site control will be satisfied by a long-term ground lease, the Department will require the execution and recordation of the Department’s form lease rider, which shall be entered into by and among the ground lessor, the ground lessee, the Department, and any other applicable parties. In all cases, the lease rider shall be recorded against the fee interest in the Project property;
- 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; or
- 7) A land sales contract or enforceable agreement for acquisition of the property.

“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.

“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 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.

“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 transit operations expenditures that directly support transit expansion, within the defined Project Area meeting the transit requirements detailed in Section 102 (c) or (d).

“TCAC” shall mean the California Tax Credit Allocation Committee and the California Tax Credit Allocation Committee Regulations, Title 4 **CCR**, Division 17, Chapter 1, as adopted July 20, 2022.

“Transit Oriented Development (TOD) Project Area” means a **Project Area** which includes at least one (1) Transit Station/Stop that is served by **High Quality Transit**.

“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.

“Transit Station/Stop” means a designated location at which the various **Qualifying Transit** service(s) drop-off and pick-up riders.

“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.

“Transportation Related Amenities” means capital improvements that are publicly accessible and provide supportive amenities to pedestrians, cyclists and transit riders (e.g., bike parking, bus shelter, benches, street trees, etc.) within the defined Project Area meeting the transit requirements detailed in Section 102 (c) or (d). TRA improvements encourage the use of the transit or active transportation activity.

“Tribal Entity” means: Tribe or a tribally designated housing entity. An Applicant that is any of the following:

- 1) An Indian Tribe as defined under USC Section 4103(13)(B) of Title 25
- 2) A Tribally Designated Housing Entity under 25 USC 4103(22)
- 3) If not a federally recognized tribe as identified above, either:
 - a. Listed in the Bureau of Indian Affairs Office of Federal Acknowledgement Petitioner List, pursuant to CFR Section 83.1 of Title 25; or
 - b. Indian Tribe located in California that is on the contact list maintained by the Native American Heritage Commission for the purpose of consultation pursuant to GC Section 65352.3

“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.

“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.

“Urban Greening” means the incorporation of greenscaped pedestrian and bicycle trail systems, **Urban Forestry**, 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. Public open space must offer reasonable hours of use for the public, such as dawn to dusk. Community gardens where residents grow edible plants do not have to be publicly accessible as long as they are available to residents of the **Affordable Housing Development**.

“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.

“Very-Low Income” has the meaning set forth in Health and Safety Code Section 50105, households with gross incomes not exceeding 50 percent of Area Median Income.

“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 to replenish groundwater supplies.

“Zero Emission Vehicle (ZEV)” means a motor vehicle equipped with clean technologies consistent with the State of California’s zero emission vehicle regulations and standards, including battery-electric vehicles (BEVs), hydrogen fuel cell electric vehicles (FCEVs), and plug-in hybrid electric vehicles (PHEVs).

Appendix B. Tribal Eligibility

A Tribal Entity may qualify for AHSC funds if their **Project** meets the following requirements:

- (a) Projects are located in **Indian country**, or located on a parcel owned by a **Tribal Entity** in fee or held in trust for the benefit of a **Tribal Entity** within the state of California, and;
- (b) The applicant meets the conditions of award funding to the extent applicable, and subject to any modifications or waivers as provided for by AB1010 (2019) (HSC Section 50406, subdivision (p)) that shall be set forth in a Standard Agreement. It is noted that these same conditions do not need to be satisfied initially to engage in the competitive award process:
 - (1) BIA Consent. The Bureau of Indian Affairs (BIA) has consented to the applicant's execution and recordation (as applicable) of all **Department**-required documents that are subject to 25 CFR sec. 152.34, 25 CFR sec. 162.012, or 25 CFR sec. 162.388, et seq., prior to award disbursement. This requirement shall not apply to projects that are located on fee land not subject to a restriction by the United States against alienation.
 - (2) Title Insurance. The **Department** has received 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**, this condition may be satisfied by a title status 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**.
 - (3) Recordation Requirements. Where recordation of instruments is a condition of award funding or otherwise required under or pursuant to the Standard Agreement, the subject instrument is recorded if recorded with the Land Titles and Records Office at the BIA or in the appropriate official records of the County in which the **Project** is located, as may be applicable.
 - (4) Fee Security Required. For all **Projects**, except those located on trust or restricted land within **Indian country**, 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.

Appendix C. Awardee Publicity Guidelines

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 (ZEV), environmental restoration, more sustainable agriculture, recycling, and much more. Find out more about the program at: 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) **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 by emailing ASHC@sgc.ca.gov.
- (e) **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) **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.

Appendix D. Allowable Supportive Service Cost Cap Increases

- (a) The following administrative notices, policies, and guidance are hereby incorporated herein by reference and shall be deemed to have the same force and effect as if set forth in full herein:
 - (1) The Department's "[Notice of Omnibus Program Guideline Amendments Supportive Services Costs Limits](#)" (Administrative Notice No. 24-05) dated October 7, 2024, and as may be subsequent amended

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

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P. O. Box 952054
Sacramento, CA 94252-2054
(916) 263-2771
www.hcd.ca.gov



January 30, 2023

Amended March 15, 2023

MEMORANDUM FOR: ALL POTENTIAL APPLICANTS

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

SUBJECT: **Affordable Housing and Sustainable Communities
Notice of Funding Availability (Round 7)**

The California Strategic Growth Council (SGC) and the California Department of Housing and Community Development (Department or HCD) are pleased to announce the release of this Notice of Funding Availability (NOFA) with **approximately \$750 million** in funds for the Affordable Housing and Sustainable Communities (AHSC or Program) program. This funding provides loans and grants to Localities, Developers, public housing authorities, transit agencies, transit operators, Program Operators, Tribal Entities, and others as identified in the Guidelines.

AHSC 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 AHSC is to reduce greenhouse gas (GHG) emissions through projects implementing land-use, housing, and transportation improvements to support infill and compact development, while supporting related and coordinated public policy objectives. Funding for AHSC is provided from the Greenhouse Gas Reduction Fund (GGRF), an account established to receive Cap-and-Trade auction proceeds.

AHSC is part of California Climate Investments, 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 HCD's Affordable Housing and Sustainable Communities Portal (AHSC Portal) no later than 4:00 p.m. Pacific Time on April 4, 2023. The Department will no longer accept hardcopy submittals.

Amended March 15, 2023

AHSC application forms, detailed instructions, webinar details, and related Program information are posted on the Department's AHSC website at <https://www.hcd.ca.gov/grants-and-funding/programs-active/affordable-housing-and-sustainable-communities>. Additional Program information may be found at SGC's AHSC website: <https://sgc.ca.gov/programs/ahsc/resources/>.

To receive information on workshops and other updates, please subscribe to the Affordable Housing and Sustainable Communities program [HCD listserv](#) and for questions contact the HCD AHSC team at AHSC@hcd.ca.gov or the SGC AHSC team at ahsc@sgc.ca.gov.

Attachment

AFFORDABLE HOUSING AND SUSTAINABLE COMMUNITIES PROGRAM

Notice of Funding Availability Round 7



**CALIFORNIA STRATEGIC
GROWTH COUNCIL**



**Gavin Newsom, Governor
State of California**

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

**Lynn von Koch-Liebert, 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>

Email: ahsc@hcd.ca.gov

January 30, 2023

Amended March 15, 2023

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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 or HCD) hereby announce the availability of approximately \$750 million in funding for the Affordable Housing and Sustainable Communities (AHSC) program. AHSC 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 AHSC.

These AHSC funds will be used for loans or grants, or a combination thereof, to projects that will achieve GHG emissions reductions to benefit communities throughout California, 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	January 30, 2023
Application Due Date	April 4, 2023, by 4:00 p.m. PDT
Award Announcement	August 2023

C. Authorizing Legislation and Regulations (Regulatory Authority)

AHSC 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). Applications submitted under this NOFA and available funds are subject to the AHSC Guidelines approved by the SGC on December 15, 2022, and as published on the SGC's AHSC website at <https://sgc.ca.gov/programs/ahsc/resources/guidelines.html>

The Guidelines include detailed information on eligibility requirements, application selection criteria, established terms, conditions, and procedures for funds awarded under AHSC. 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 in this NOFA are either defined herein or 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.

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 Project (ICP) 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 funding award maximum:** For projects without other HCD awards, the maximum AHSC loan or grant award, or combination thereof, is \$50 million, with a minimum award of \$10 million. For these projects, the maximum Affordable Housing Development loan amount is \$35 million, and the maximum cumulative per Project grant amount is \$15 million.

Additionally, for Projects that have or will have other HCD funding, the maximum cumulative per-project award of all HCD loan sources for housing development is \$35 million.

2. **AHSC funding award maximum:** A single Developer may receive no more than \$100 million per NOFA funding cycle. This limitation may be waived by SGC, if necessary, to meet statutory requirements referenced in Guidelines Section 108, Application Process.
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 (AHD) 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. Transition Reserve

Projects having or proposing project-based rental assistance shall comply with the

Department's Pooled Transition Reserve Policy set forth in HCD's Administrative Notice No. 23-01: <https://www.hcd.ca.gov/sites/default/files/docs/grants-and-funding/hcd-administrative-memo-transition-reserve-policy.pdf>

E. Funding Goals, Geographic Distribution of Funds, and Set-Asides

The Project Area Type funding goals, geographic goals, Tribal Entity goals, Affordable Housing statutory requirements, funding targets, and AHSC statutory funding set-asides are set forth in Guidelines Section 108(h). Additional policies that may impact the final decision of Project awards are set forth in Guidelines Section 108(i).

F. Funding Limits

Use of multiple HCD funding sources on the same Assisted Units is permitted, subject to the following limitations. (For the purpose of identifying funding limits, Units used in the calculation of AHSC grant amounts will be considered assisted):

1. Notwithstanding any conflicts with the AHSC Guidelines or NOFA, the HCD Repeal of Stacking Prohibition of Multiple Department Funding Sources Memorandum, dated August 20, 2021, is applicable. In the event of a conflict, the NOFA or Guidelines will prevail.
2. Total HCD funding per Project, including funds awarded under this NOFA, shall not exceed the following percentages of the total development cost (TDC):
 - < 40 percent of TDCs for Projects utilizing 9 percent tax credits
 - < 50 percent of TDCs for Projects utilizing 4 percent tax credits
 - < 80 percent of TDCs for Projects not utilizing tax credits

For purposes of calculating total HCD funding, all AHD and Housing Related Infrastructure (HRI) funding shall be considered. Additionally, prior awards made to the Project or any component of the Project, any funds awarded pursuant to this NOFA, and any applicable future HCD awards subsequent to any award made pursuant to this NOFA shall be considered. Note that total HCD funding, for these purposes, does not include STI, TRA, or PGM grants.

All Department funding sources listed in the HCD Repeal of Stacking Prohibition of Multiple Department Funding Sources Memorandum https://www.hcd.ca.gov/grants-funding/docs/admin_memo21-06_stacking_prohibition_repeal.pdf dated August 20, 2021, are applicable to the percentages of total development cost listed above. For AHSC, these sources include AHD loans and HRI grants, but not STI, TRA or PGM grants. This HCD-wide Department funding cap applies not only to AHSC Round 7 awards, but to all Department awards.

At the sole discretion of the SGC's Executive Director, funding levels in excess of the percentages above may be approved as exceptions to the limits if they

uniquely advance state policy priorities. Examples include large development Projects that include transformative community investments and advance climate goals through infill development, high density construction and proximity to transit.

To request an exception, the Applicant must submit justification prior to their application under this NOFA. It is in the Applicant's interest to submit justification as early as possible. After justifications are submitted, a recommendation from staff will be made based upon the strength of evidence and submitted to the SGC Executive Director for consideration. If approved, Applicants must submit documentation of approval with any subsequent Department applications for the applicable Project. A form for outlining the justification of the exception request will be provided by the Department.

G. Cost Limitations and Developer Fee

Developer fee limits specified in UMR Section 8312 shall apply, except that:

1. UMR Section 8312(d) shall not apply.
2. For non-tax credit new construction Projects, the total developer fee shall not exceed the following:
 - a. For Projects with 49 or fewer Restricted Units (excluding Units restricted at levels above 60 percent of AMI): the greater of \$40,000 per Restricted/manager's Unit or \$1,200,000.
 - b. For Projects with between 50 and 100 Restricted Units (excluding Units restricted at levels above 60 percent of AMI): \$2,200,000; and
 - c. For Projects with more than 100 Restricted Units (excluding Units restricted at levels above 60 percent of AMI): \$2,200,000 plus \$20,000 per Restricted Unit in excess of 100 up to a maximum of \$3,500,000. The developer fee in excess of \$2,200,000 must be deferred. Payment of deferred developer fee shall be in compliance with UMR Section 8314.
3. For Projects utilizing 4 percent tax credits, developer fee payments shall not exceed the amount that may be included in Project costs pursuant to Title 4 California Code of Regulations (CCR), Section 10327(c)(2)(B); and
4. Projects that include a Tribal Entity that relies on a partner to meet the experience requirements of an eligible Developer shall have their allowable total developer fee increased according to the following:
 - a. For non-tax credit Projects, an increase of \$300,000 over the limits set forth in (b)(2) (a)-(c) above. Additionally, for Projects with more than 100 Units as defined above in (b)(2)(c), the developer fee paid from sources may increase up to \$2,640,000.

- b. For Projects utilizing 4 percent tax credits, an increase consistent with Title 4 CCR, Section 10327(c)(2)(E), if eligible pursuant to that section.

H. 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 established in Section 106, Program Threshold Requirements of the Guidelines.

1. For projects secured by leasehold security, leases must meet the requirements of UMR §8316, and both the Borrower and the fee owner of the property must execute the Department's form template lease rider without modification. The lease rider amends the lease and must be recorded on the fee estate.

I. Scoring and Ranking

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

J. Negative Points and Disencumbrance Policies

The Department's Negative Points Policy ([Administrative Notice Number 2022-01](#)) and Disencumbrance Policy ([Administrative Notice Number 2022-02](#)), dated March 30, 2022 or as amended and in effect prior to the established application due date which are published on the Department's website at <https://www.hcd.ca.gov/sites/default/files/2022-03/Disencumbrance-Policy-FINAL-03-31-22.pdf> are hereby incorporated by this reference to this NOFA. The Department shall apply the Negative Points Policy with equal force as all other provisions set forth herein. The Department shall implement the Negative Points Policy with reasonable and necessary discretion to advance AHSC policy and funding goals.

If the Applicant is subject to a negative points assessment based on the criteria outlined in the Department's Negative Points Policy or is determined to be ineligible for funding, HCD shall notify the Applicant in writing in the initial point score letter.

III. Application Submission and Review Procedures

Applications must meet eligibility requirements upon submission (except as expressly indicated in the Guidelines or Application Workbook). 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.

A. HCD's AHSC Portal Application Components

Complete applications must include the following components:

1. AHSC Application Workbook

All Applicants must complete and submit the AHSC Application Workbook and supporting documentation.

2. AHSC Benefits Calculator Tool

All Applicants must complete and submit the AHSC Benefits Calculator Tool to meet requirements referenced in Guidelines Section 106, Program Threshold Requirements and Estimated GHG Reduction Scoring in Section 107, Scoring Criteria.

3. Electronic AHSC Portal Submission

Application materials must be submitted electronically via HCD's AHSC Portal no later than 4:00 p.m. Pacific Time on **April 4, 2023**. Requirements for uploading the AHSC Application Workbook, required supporting documentation, and identified naming conventions are described in the application instructions that will be available when the application is posted to the AHSC website.

Personal deliveries will not be accepted. The Department will no longer accept hardcopy submittals. No facsimiles, incomplete applications, application revisions, or walk-in application packages will be accepted.

B. 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. Applications with a final combined quantitative policy criteria and Greenhouse Gas Quantification Methodology point score of fewer than 41 points will not be eligible for award and will not be assigned a narrative score. The final score letter will include notification of application status.

3. Phase Three

An interagency team will review the narrative section of eligible applications. During Phase Three, an in- depth evaluation of the Project's financial feasibility will be performed.

C. Application Workshops

AHSC staff will conduct application webinars and pre-application consultations for the Round 7 application submissions. AHSC webinar details and appointment slots for the pre-application consultations will be posted on the SGC website:

<https://sgc.ca.gov/programs/ahsc/resources/guidelines.html> [sgc.ca.gov] and announced through the SGC AHSC E-Mail list

D. 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 (Government Code Sections 6250-6276.48). As such, any materials provided are subject to disclosure 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, social security 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.

E. Concurrent Applications

The Department will allow Applicants under this NOFA to pursue more than one funding scenario. This means that a separate, concurrent application to other HCD program funding sources is permitted. All applications under review and anticipated applications must be disclosed in the AHSC application workbook. In instances where such Applicants are competitive for an award, the Department will consult with Applicants to discern which funding scenarios are optimal for Project feasibility while balancing cost containment.

Submission of two concurrent AHSC applications proposing 4 percent and 9 percent tax credit is prohibited. Submitting an AHSC application proposing 4 percent tax credits to the Department and submitting a concurrent 9 percent TCAC application is prohibited without prior approval from the Department.

If switching from a 4 percent to 9 percent project after receiving an AHSC award, the

award will be resized and the award letter reissued to reflect the reduced award amount using the unit mix as originally submitted in the application. Please note that the 24-month disencumbrance deadline, however, will continue to be tied to the date of the original award letter. The Sponsor must demonstrate that any resulting gap from the resizing of the loan has been covered through an alternative funding source.

If switching from a 9 percent to a 4 percent project, the award will NOT be resized

Under both circumstances, the Department will only allow a switch between 4 percent and 9 percent one time per project. The Department MUST be notified and, if required, an amended award letter be issued in advance of application submittal to CDLAC or TCAC.

No final determination can be made on whether a specific project may swap from 4 percent to 9 percent, or vice-versa, until updated application materials indicating changes to the project's budget have been submitted, reviewed, and approved by AHSC program staff.

F. Prior Awards

Applicants must disclose all awards of loans and grants for the project at the time of application submittal. Applicants seeking to substitute previously awarded HCD funds, including but not limited to substitutions to increase the amount of an award, must first withdraw their previous award in writing and provide reasonable justification that the substitution is necessary to ensure Project feasibility. A consultation with Department Program staff is required at the time of the withdrawal. Substitutions based solely upon Applicant preference or convenience will not be permitted. However, it is allowable for Applicants that wish to retain their previous award to apply for another funding source available within this NOFA, so long as the previous award is unmodified.

In general, no changes to unit mix or other Project-specific criteria as represented for a previous award will be allowed if it would have negatively impacted competitiveness under that program. However, the Department will allow previously awarded Projects to lower their proposed income targets from one application to the next, so long as the total unit count remains the same. The Department will restrict units to the lowest targeting across all awarded funds and will require Projects awarded from a program with prioritized target populations to maintain the special population units (increasing target population and/or Restricted Units is permitted). For Projects proposing a reduction to Area Median Income (AMI) levels on the unit mix, prior to application the Recipient must engage with Program staff of their existing award and confirm the change does not impact Project feasibility and would not cause a reduction in awarded funds pursuant to an existing award program's requirement.

G. Significant Changes in Project After Application

The Department will review, and score based on information provided in the application. If there is a significant departure from the application, the Department may re-evaluate the Project's score, reduce loan or grant amount, or assign negative points

to the Developer/Recipient.

IV. Appeals

A. Basis of Appeals

1. Upon receipt of the Department's written notice that an application is incomplete, has failed threshold review, or has otherwise been determined to provide an insufficient basis for an award, Applicants under this NOFA may appeal such decision(s) to the Branch Chief or their designee pursuant to this section.
2. No Applicant shall have the right to appeal a decision of the Department relating to another Applicant's application (e.g., eligibility, award). Any request to appeal HCD's decision regarding an application shall be reviewed for compliance with the AHSC Guidelines and this NOFA. All decisions rendered shall be made by the Branch Chief or their designee. The decision shall be final, binding, and conclusive, and shall constitute the final action of the Department.
3. The appeal process provided herein applies solely to the decision of the Department made in this Program NOFA. For greater specificity, Applicants may refer to the appeal procedure set forth in section "V. Appeals" in the Multifamily Finance Super Notice of Funding Availability dated March 30, 2022, Amended June 10, 2022, which is incorporated hereto by this reference, and which the Department shall, to the extent not contrary to this NOFA and feasible, substantially follow.

B. Appeal Process and Deadlines

1. Process: To file an appeal, Applicants must submit to the Branch Chief or their designee, 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 or materials will be accepted or considered thereafter. Appeals must be submitted to the Department at ahsc@hcd.ca.gov and SGC at ahsc@sgc.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, or initial score letters, as applicable, 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 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 on the SGC's AHSC website at <http://www.sgc.ca.gov/meetings> 10 days prior to the SGC public meeting.

B. Contracts

Successful Applicants (Recipients) will enter into one or more Standard Agreements with the Department. The Standard Agreement contains relevant state and federal requirements, as well as specific information about the award and work to be performed.

A condition of award will be that a Standard Agreement must be executed by the Recipient within 90 days (contracting period) of HCD's issuance of the award letter. Failure to execute the Standard Agreement(s) within the contracting period may result in award cancellation. The Recipient shall remain a party to the Standard Agreement for the entire term of the Standard Agreement; removal of the Recipient without prior HCD consent is prohibited and will result in a default. Once a Project is awarded HCD funds, the Developer/Recipient is acknowledging the Project as submitted and approved is the Project that is to be funded and built. Any bifurcation would make that award null and void, as the awarded Project is no longer feasible as originally submitted and awarded funds are unable to be assumed or assigned.

C. AHSC Cross-Default Provision

Awards are based on the total points awarded to the application during a highly competitive process. The Standard Agreements set forth requirements for timely completion of Affordable Housing Development (AHD), Housing Related Infrastructure (HRI), Sustainable Transportation Infrastructure (STI), Transportation Related Infrastructure (TRA), or Program (PGM) components. If all components are not timely completed pursuant to Program requirements, the entire award may be disencumbered, and disbursed funds recaptured. The Standard Agreements will expressly cross-default all components of the award to one another.

The Department recognizes the Recipient may enter into separate side agreements to address individual Developer responsibilities with respect to each other and with regard to Program funds; provided, however, in no event shall any such agreement alter or amend the respective obligations of the Recipient to the Department under the applicable loan or grant documents.

D. Departmental Cross-Default Provision

In the event the Project is or has been awarded additional Department funding, any and all such funding, including the award of AHSC Program funds, will be cross defaulted to and among one another in the respective loan or, where applicable, grant documents. A default under one source of Departmental funding shall be default under any and all other sources of Department funding in the Project.

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 (Health and Safety Code Sections 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 (Health and Safety Code Sections 37000 – 37002) provides clarification as to when Article XXXIV is applicable. Health and Safety Code Section 37001, for example, identifies project types that are not considered “low-rent housing projects.”

Applicants must submit documentation substantiating 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 demonstrates Article XXXIV authority for the project. A local government official with authority must prepare the allocation letter, and it must 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 AHSC is subject to the Pet Friendly Housing Act of 2017 (Health and Safety Code Section 50466). Each Recipient 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.

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 through the Department's email list and will post the revisions to HCD's AHSC website. Please subscribe to HCD's email list at [Email Signup](#).

B. Conflicts

It is the duty and responsibility of the Applicant to review any funding source they obtain for a Project to ensure each of the requirements for those funding sources are compatible with the Department program requirements.

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

MEMORANDUM OF UNDERSTANDING

THIS MEMORANDUM OF UNDERSTANDING (**MOU**), dated as of March 31, 2023 (Effective Date), is by and between the San Francisco Municipal Transportation Agency (SFMTA) and the Mayor's Office of Housing and Community Development (MOHCD).

RECITALS

A. The City and County of San Francisco (City), through MOHCD, will own the real property located at 160 Freelon Street, as more particularly described in the attached Exhibit A (160 Freelon Street) and has made a loan for predevelopment costs and construction of an 85-unit affordable housing development (160 Freelon Family Housing Project), to a subsidiary of Related California and San Francisco Housing Development Corporation.

B. BRIDGE Housing owns the real property located generally in the Balboa Reservoir, near the corner of Frida Kahlo Way and Ocean Avenue, as more particularly described in the attached Exhibit B (Balboa Reservoir Building A), and the City, through MOHCD, has made a loan for predevelopment costs and construction of a 159-unit affordable housing development (Reservoir Building B Housing Project) to a subsidiary of BRIDGE Housing.

C. The City and County of San Francisco (City), through the Office of Community Investment and Infrastructure (OCII), owns the real property located at 200 Folsom Street, as more particularly described in the attached Exhibit C (200 Folsom Street) and has made a loan for predevelopment costs and construction of an 184-unit affordable housing development (Transbay Block 2A Family Housing Project), to a subsidiary of Mercy Housing California.

D. MidPen Housing Corporation has executed a Ground Lease Option Agreement to the real property at 850 Turk, as more particularly described in the attached Exhibit D (850 Turk Street) and has approval from the State of California to construction of a 92-unit affordable housing development (850 Turk Family Housing Project), to a subsidiary of MidPen Housing.

E. On January 20, 2023, the State of California's Strategic Growth Council and the Department of Housing and Community Development issued a Notice of Funding Availability, under the Affordable Housing and Sustainable Communities (AHSC) Program established under Public Resources Code Sections 75200, et seq. The AHSC Program provides grants and loans to applicants identified through a competitive process for the development of projects that, under the Program Guidelines, will achieve greenhouse gas reductions and benefit disadvantaged communities through increased accessibility to affordable housing, employment centers, and key destinations via low-carbon transportation.

F. MOHCD identified the 160 Freelon Family Housing, Reservoir Block A Housing,

850 Turk Family Housing, and Transbay 2A Family Housing (collectively, the Housing Projects) as strong candidates for AHSC Program funding.

G. The SFMTA has identified qualified sustainable transportation improvements, which include transit capital improvements along Howard Streetscape, Transit Only Lane colorization and 3rd Street Transit and Safety Project for 160 Freelon Family Project (160 Freelon Family Transportation Improvements), improvements along the 29 Sunset route for the Reservoir Building A (Reservoir Building A Transportation Improvements), transit priority signals for Transbay 2A (Transbay Transportation Improvements), and Better Market Streets bike, ped and transit improvements for 850 Turk Family Project (850 Turk Family Transportation Improvements).

H. The City, through MOHCD intends to jointly submit an AHSC application for the 160 Freelon Family with a subsidiary of Related California and San Francisco Housing Corporation, which includes the 160 Freelon Family Housing Project and 160 Freelon Family Transportation Improvements. MOHCD will request up to \$50,000,000 for the 160 Freelon Family Housing Project, including up to \$10,325,000 for the 160 Freelon Transportation Improvements in the AHSC application.

I. Similarly, the City, through MOHCD, intends to jointly submit an AHSC application for Reservoir Building A Housing Project with a subsidiary of BRIDGE Housing, which includes the Reservoir Building A Project and the Reservoir Building A Transportation Improvements. MOHCD will request up to \$50,000,000 for the Reservoir Building A Housing Project, including up to \$4,000,000 for the Reservoir Building A Transportation Improvements in the AHSC application for MTA work.

J. In addition, the City, through MOHCD, intends to jointly submit an AHSC application for 850 Turk Family Housing Project with a subsidiary of MidPen Housing Corporation, which includes the 850 Turk Family Project and the 850 Turk Family Transportation Improvements. MOHCD will request up to \$50,000,000 for the 850 Turk Family Housing Project including up to \$9,200,000 for 850 Turk Family Housing Transportation Improvements in the AHSC application for MTA work.

K. In addition, the City, through MOHCD, intends to jointly submit an AHSC application for Transbay 2A Housing Project with a subsidiary of Mercy Housing, which includes the Transbay 2A Project and the Transbay 2A Transportation Improvements. MOHCD will request up to \$50,000,000 for the Transbay 2A Housing Project, including up to \$1,800,000 for the Transbay 2A Transportation Improvements in the AHSC application for MTA work.

L. Should the State approve the respective applications and award all grants, including the funds for the 160 Freelon Family Transportation Improvements, the Reservoir Building A Transportation Improvements, the Transbay Transportation Improvements, and the 850 Turk Family Transportation Improvements (collectively, the Transportation Improvements), such grant funds will be delivered to the SFMTA, on a reimbursement basis, for the SFMTA's work on the Transportation Improvements.

NOW, THEREFORE, the parties agree as follows:

AGREEMENT

1. Award Amounts. For the 160 Freelon Family, MOHCD will receive up to \$35,000,000 of the award for the 160 Freelon Family Housing Project, and the SFMTA will receive up to \$10,325,000 for the 160 Freelon Family Transportation Improvements. For Reservoir Building A, MOHCD will receive up to \$35,000,000 of the award for the Reservoir Building A Housing Project, and the SFMTA will receive up to \$4,000,000 for the Reservoir Building A Transportation Improvements. For Transbay 2A, MOHCD will receive up to \$35,000,000 of the award for the Transbay 2A Housing Project, and the SFMTA will receive up to \$1,800,000 for the Transbay 2A Transportation Improvements. For the 850 Turk Family, MidPen Housing Corporation will receive up to \$35,000,000 of the award for the 850 Turk Family Housing Project, and SFMTA will receive up to \$9,200,000 for the 850 Turk Family Transportation Improvements. Each of the respective City agencies must comply with State regulations and guidance governing the disbursement of the AHSC funds. Each of the respective City agencies must comply with State regulations and guidance governing the disbursement of the AHSC funds.

2. Project Collaboration. In order for the Housing Projects to successfully utilize Transportation Improvements, MOHCD and the SFMTA must collaborate effectively, and both agencies must have authority to review applications for funding related to the GHG reduction goals of the AHSC program. In furtherance of such goals, MOHCD and the SFMTA will each designate a single Project Manager for the Transportation Improvement Projects, who will serve as the points of contact for communications relating to all of the Transportation Improvement Projects and will be primarily responsible for coordinating the review, comments and approvals of their respective agencies relating to the matters described in this MOU. While MOHCD will have overall responsibility for all aspects of the development of the Housing Projects, the SFMTA will retain control of the Transportation Improvement Projects.

a. Community Engagement. MOHCD will be solely responsible for community engagement and building community support related to the Housing Projects. MOHCD will notify the SFMTA in advance of any public meeting regarding the Housing Projects, and MOHCD and the SFMTA will collaborate to provide timely information to the public. The SFMTA will be solely responsible for community engagement and building community support related to the Transportation Improvements. The SFMTA will notify MOHCD in advance of any public meeting regarding the Transportation Improvements, and MOHCD and the SFMTA will collaborate to provide timely information to the public.

b. Affordable Housing Development Plan. MOHCD will be primarily responsible for coordinating the development plans with Related California and San Francisco Housing Development Corporation (160 Freelon Family Housing Project), BRIDGE Housing (Reservoir Building A Housing Project), MidPen Housing Corporation (850 Turk Family Housing Project), and Mercy Housing California (Transbay 2A Housing Project)

c. Transportation Improvements. Subject to completion of environmental

review of the Transportation Improvements and selection of any or all Transportation Improvements for implementation, the SFMTA will be responsible for implementing the projects and coordinating any such implementation with the developers of the respective development projects.

d. Project Costs. MOHCD will assume all development costs associated with the Housing Projects. The SFMTA will not be responsible for any development costs of the Housing Projects other than its own staff time, and will be responsible for all costs directly associated with the consultation, advice, review, and possible implementation of the Transportation Improvements (Transportation Improvement Costs or Costs).

e. Joint and Several Liability. The City, acting through MOHCD, shall assume any joint and several liability (with the respective developers) for completion of the Transportation Improvements required by the terms of any grant awarded under the AHSC Program. MOHCD shall assume any joint and several liability for completion of Housing Projects required by the terms of the grants awarded under the AHSC Program.

f. Costs Reimbursement for Transportation Improvements. MOHCD will submit work authorization(s) or work order(s), as required by the Controller, to the SFMTA for all incurred Transportation Improvement Costs. The SFMTA will charge MOHCD and provide appropriate backup documentation (e.g., invoices from contractors). The SFMTA will be responsible for any costs that may be disallowed by the AHSC Program.

3. Term. The term of this MOU shall commence on the Effective Date and terminate upon completion of the AHSC requirements for the Transportation Improvements, should they be implemented. In addition, MOHCD and the SFMTA agree that if the Transportation Improvements are infeasible for any reason at any time prior to execution of the commitment from AHSC (the Standard Agreement), then either party may terminate this MOU upon written notice to the other.

4. Notices. All notices, demands, consents or approvals that are or may be required to be given by either party to the other under this MOU shall be in writing and shall be deemed to have been fully given when delivered in person, and addressed as follows:

If to the SFMTA:

Municipal Transportation Agency
1 South Van Ness Avenue, 7th Floor
San Francisco, CA 94103
Attn: Joel Goldberg
Joel.Goldberg@sfmta.com

If to MOHCD:

Mayor's Office of Housing and Community Development
1 South Van Ness Avenue, 5th Floor
San Francisco, California 94103
Attn: Eric D. Shaw, Director

Eric.Shaw@sfgov.org

or such other address that a party may from time to time designate by notice to the other parties given pursuant to the provisions of this Section.

5. Authority. All matters requiring MOHCD's approval shall be approved by the Director of MOHCD or his or her designee. All matters requiring the SFMTA's approval shall be approved by the SFMTA's Director of Transportation or his or her designee.

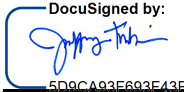
Cooperation. The SFMTA and MOHCD acknowledge and agree that the Housing Projects, the Transportation Improvements are in the predevelopment phase, and that some of the Transportation Improvements have not undergone environmental review. Should the Transportation Improvements be selected for implementation, the SFMTA and MOHCD shall use reasonable efforts to do, or cause to be done, all things reasonably necessary or advisable to complete the Transportation Improvements according to the terms of the State's Standard Agreement. Notwithstanding anything to the contrary in this MOU, no party is in any way limiting its discretion or the discretion of any department, board or commission with jurisdiction over the actions described in this MOU, including, without limitation, the discretion to eliminate or substitute all or any portion of the Transportation Improvements

6. Miscellaneous. (a) This MOU may be amended or modified only by a document signed by the SFMTA's Director of Transportation, or his or her designee, and the Director of MOHCD, or his or her designee. (b) No waiver by any party of any of the provisions of this MOU shall be effective unless in writing and signed by the party's authorized representative, and only to the extent expressly provided in such written waiver. (c) This MOU (including all exhibits) contains the entire understanding between the parties as of the date of this MOU, and all prior written or oral negotiations, discussions, understandings and agreements are merged herein.

IN WITNESS WHEREOF, the parties have caused this MOU to be executed as of the date first written above.

SFMTA:

SAN FRANCISCO MUNICIPAL
TRANSPORTATION AGENCY

By: 
5D9CA93E693E43E
Jeffrey P. Tumlin
Director of Transportation
3/30/2023 | 3:41 PM PDT
Date: _____

MOHCD:

MAYOR'S OFFICE OF HOUSING AND
COMMUNITY DEVELOPMENT

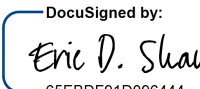
By: 
65EBDF91D096444...
Eric D. Shaw,
Director
3/30/2023 | 4:17 PM PDT
Date: _____

Exhibit A
160 Freelon Family Property

Exhibit B
Reservoir Building A Property

Exhibit C
200 Folsom Street

Exhibit E
850 Turk Street

AHSC IMPLEMENTATION AND MUTUAL INDEMNITY AGREEMENT (Balboa Reservoir Building A)

THIS AHSC IMPLEMENTATION AND MUTUAL INDEMNITY AGREEMENT (the “Agreement”) is made and entered into as of April 3, 2023 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 January 30, 2023 (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 A affordable housing project in San Francisco, California, to be constructed by the Developer (the “Housing Project”); (B) the provision of certain sustainable transportation infrastructure by the District (the “BART STI Improvements”); and (C) certain costs related to purchase of SF MUNI “A” transit passes for Housing Project residents allowing use of BART within San Francisco, creation of in person advancement courses for residents, and funding to support local workforce development efforts (the “AHSC Programs”), together with other sustainable transportation infrastructure to be constructed by the City and County of San Francisco, which are not pertinent to this agreement. These improvements are described in more detail in the final application to be submitted by April 4, 2023 (collectively, the “AHSC Application”).

C. The AHSC Application seeks an award to the Developer in an aggregate amount of up to \$44,749,529 in AHSC Funds consisting in part of: (A) \$33,000,000 of AHSC loan Funds for a permanent loan (“AHSC Loan”) which will be disbursed to Balboa Gateway LP or its successor (the “Partnership”), for construction of the Housing Project; (B) \$5,034,000 of the AHSC grant funds for the purpose of reimbursing the cost of the BART STI Improvements; and (C) \$6,715,529 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)(A) of the 2023 AHSC Program Guidelines dated December 15, 2022 (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, included in the AHSC Application:

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.

F. 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 April 4, 2023. Below is a list of these projects:

1. STI: Rail Car Procurement Program: On November 8, 2017, under a contract to Bombardier Transit Corporation for the procurement of new rail cars, BART's first replacement rail cars were delivered. As of January 2023, BART has accepted 451 Fleet-of-the-Future rail cars and decommissioned 239 legacy rail cars as part of an overall program to not only replace but expand its fleet.
2. STI. eBART DMU: Procurement of eight Diesel Multiple Unit (DMU) Vehicles to serve BART to Antioch extension. The vehicles include a variety of amenities including high-back seats, six digital signs (with multiple language support), automated audio announcements, clear station arrival / destination signs, and modern climate control systems. Project Cost: ~\$65M. Completed May 2018.

G. Subject to receipt of an award of the AHSC Financing, the District shall be responsible for completing the BART STI Improvements, 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 (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, BART STI Improvements, 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 shall be collectively referred to herein as the "AHSC Documents."

H. 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 BART STI Improvements in accordance with the terms of the AHSC Documents and the approved design and construction documents. 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 BART STI Improvements 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, court costs and reasonable attorneys' fees, arising out of or in connection with the District's performance of or failure to perform its obligations to complete the BART STI Improvements, in the manner and within the time periods set forth in the AHSC Documents, but excluding any speculative, consequential, or punitive damages. However, in no event shall the Developer Indemnified Party be indemnified hereunder for any Claims to the extent said Claims result from Developer Indemnified 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 District's indemnification obligations under this paragraph, 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, court costs and reasonable 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 Project, in the manner and within the time periods, and to otherwise perform any covenants, set forth in the AHSC Documents, but excluding any speculative, consequential, or punitive damages. However, in no event shall the District Indemnified Party be indemnified hereunder for any Claims to the extent said Claims result from the District Indemnified 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 Developer's indemnification obligations under this paragraph, 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 the District will report on the District's progress on the BART STI 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. 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 BART STI Improvements, irrespective of whether such costs exceed the portion of the AHSC Grant designated for the BART STI Improvements.

7. Billing and Payment Procedure: The District shall submit to Developer all reimbursement requests in the form of invoices for the costs associated with the BART STI Improvements. Invoices will include backup documentation as required by HCD and a cover sheet indicating the budget line item from which each cost shall be drawn and shall be submitted no more than once per month. Once the AHSC Grant Disbursement Agreement is executed, 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 BART STI Improvements to the District shall be a default under this Agreement and shall excuse the District from performance of the BART STI Improvements.

8. Implementation Agreements. In the event a grant award is received from AHSC, the Parties recognize that each Party may need additional assurances from another 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 BART STI Improvements. 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 Developer's Board of Directors.

9. 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: Abigail Thorne-Lyman
Director, Real Estate & Property Development
BART
2150 Webster St., 9th floor
Oakland, CA 94612
510-464-6140
athorne@bart.gov

Developer: BRIDGE Housing Corporation
600 California Suite 900
San Francisco, CA 94618
Attention:
Jeremy Hoffman, Director of Real Estate Development
510-501-4529
jhoffman@bridgehousing.com

10. 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 such failure within 30 days after written notice of such failure has been delivered to the defaulting Party in accordance with Section 9 above; or

(b) A Party purports to revoke this Agreement or asserts that this Agreement has become ineffective for any reason.

11. Termination. This Agreement shall terminate upon the earlier of: (i) completion of all obligations under the AHSC Documents related to the BART STI Improvements; or (ii) mutual agreement of the Parties hereto.

12. 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.

13. Assignment. District hereby acknowledges and approves the assignment by 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 13, and the parties hereto shall not amend, modify or terminate the Agreement without Construction Lender's express written consent.

14. 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:

San Francisco Bay Area Rapid Transit District,
a rapid transit district

DocuSigned by:
By: 
Name: Val Menotti
Its: Chief Planning & Development Officer

Developer:

BRIDGE Housing Corporation,
a California nonprofit public benefit corporation

DocuSigned by:
By: 
Name: Brad Wilkin
Its: Executive Vice President

EXHIBIT A**Schedule of Performance****BART:***BART STI Improvements*

Performance Milestone	Date
Begin procurement	August 31, 2023
Complete delivery of transit vehicles	August 31, 2024
All funds fully disbursed	November 30, 2027

Developer:

Performance Milestone	Date
Execute Standard Agreement for AHSC Grants	December 1, 2023
Execute Disbursement Agreement for AHSC Grants	January 1, 2027
Begin construction of housing project	January 1, 2027
Complete construction and obtain Certificate of Occupancy	December 31, 2029
All funds fully disbursed	December 31, 2029

[Apply for Grant - BRIDGE Housing Corporation - Assumption of Liability - Department of Housing and Community Development Affordable Housing and Sustainable Communities Program - Balboa Reservoir Building A]

Resolution authorizing the Mayor's Office of Housing and Community Development on behalf of the City and County of San Francisco to execute a grant application, as defined herein, under the Department of Housing and Community Development Affordable Housing and Sustainable Communities ("AHSC") Program as a joint applicant with BRIDGE Housing Corporation, a California public benefit corporation, for the 159-unit 100% affordable housing project identified as Balboa Reservoir Building A; authorizing the City to assume any joint and several liability for completion of the projects required by the terms of any grant awarded under the AHSC Program; and adopting findings under the California Environmental Quality Act ("CEQA"), the CEQA Guidelines, and Administrative Code, Chapter 31.

WHEREAS, The State of California, the Strategic Growth Council ("SGC") and the Department of Housing and Community Development ("Department") has issued a Notice of Funding Availability ("NOFA") dated January 30, 2023, under the Affordable Housing and Sustainable Communities ("AHSC") Program established under Division 44, Part 1 of the Public Resources Code commencing with Section 75200; and

WHEREAS, The SGC is authorized to approve funding allocations for the AHSC Program, subject to the terms and conditions of the NOFA, AHSC Program Guidelines adopted by SGC on December 15, 2022 ("Program Guidelines"), an application package released by the Department for the AHSC Program ("Application Package"), and an AHSC standard agreement with the State of California ("Standard Agreement"), the Department is

1 authorized to administer the approved funding allocations of the AHSC Program; and

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

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

9 WHEREAS, BRIDGE Housing Corporation, a California public benefit corporation
10 ("Developer"), has requested the City and County of San Francisco (the "City"), acting by and
11 through the Mayor's Office of Housing and Community Development ("MOHCD"), to be a joint
12 applicant for its 159-unit unit, 100% affordable housing project located generally north of
13 Ocean Avenue commercial district, west of City College of San Francisco Ocean Campus,
14 east of the Westbrook Park neighborhood and south off Archbishop Riordan High School (the
15 "Reservoir Building A"); and

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

1 actions contemplated in this Ordinance, the Board of Supervisors has reviewed the FEIR and
2 related documents, and adopts as its own and incorporates by reference herein the CEQA
3 Findings, including the statement of overriding considerations, and the MMRP; and

4 WHEREAS, In order to be highly competitive for the AHSC funds, the Developer and
5 MOHCD will also apply for AHSC grant funds to purchase two BART cars ("BART cars"), in
6 order to further reduce greenhouse gas emissions; and

7 WHEREAS, BART and the Developer will enter into a Memorandum of Understanding
8 regarding the purchase of the BART cars; and

9 WHEREAS, The Municipal Transportation Agency ("SFMTA") plans to perform transit
10 improvements in the vicinity of the Project (the "SFMTA Work"); and

11 WHEREAS, The Developer plans to perform streetscape improvements to support
12 bicycles and pedestrians as part of Reservoir Building A; and

13 WHEREAS, The City, acting by and through MOHCD, desires to apply for AHSC
14 Program funds and submit an Application Package as a joint applicant with the Developer;
15 and

16 WHEREAS, SFMTA and MOHCD will enter into a Memorandum of Understanding to
17 make commitments related to completion of the SFMTA Work as included in the Application
18 Package; and

19 WHEREAS, The City, acting by and through MOHCD, desires to apply for AHSC
20 Program funds and submit an Application Package as a joint applicant with the Developer;
21 now, therefore, be it

22 RESOLVED, That the Board of Supervisors delegates to MOHCD, on behalf of the
23 City, the authority to execute an application to the AHSC Program as detailed in the NOFA
24 dated January 30, 2023, for Round 7, in a total amount not to exceed \$50,000,000 of which
25 up to \$35,000,000 will be provided as a loan to the Developer for the Project as an Affordable

1 Housing Development ("AHD") ("AHSC Loan") and a grant to the City for Housing-Related
2 Infrastructure ("HRI"), and up to \$15,000,000 will be provided as a grant to the City, BART and
3 the Developer for Sustainable Transportation Infrastructure ("STI"), Transit-Related Amenities
4 ("TRA") or Program ("PGM") activities ("AHSC Grant") as defined the AHSC Program
5 Guidelines and sign AHSC Program documents; and, be it

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

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

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

25 FURTHER RESOLVED, That all actions authorized and directed by this Resolution and

heretofore taken are ratified, approved, and confirmed by this Board of Supervisors.

RECOMMENDED:

 s

Eric D. Shaw, Director,

Mayor's Office of Housing and Community Development



City and County of San Francisco
Tails
Resolution

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

File Number: 230220

Date Passed: April 04, 2023

Resolution authorizing the Mayor's Office of Housing and Community Development on behalf of the City and County of San Francisco to execute a grant application, as defined herein, under the Department of Housing and Community Development Affordable Housing and Sustainable Communities ("AHSC") Program as a joint applicant with BRIDGE Housing Corporation, a California public benefit corporation, for the 159-unit 100% affordable housing project identified as Balboa Reservoir Building A; authorizing the City to assume any joint and several liability for completion of the projects required by the terms of any grant awarded under the AHSC Program; and adopting findings under the California Environmental Quality Act ("CEQA"), the CEQA Guidelines, and Administrative Code, Chapter 31.

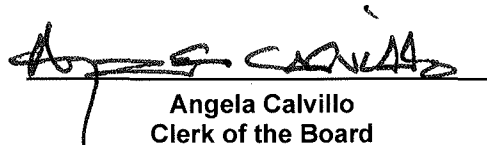
March 22, 2023 Budget and Finance Committee - RECOMMENDED

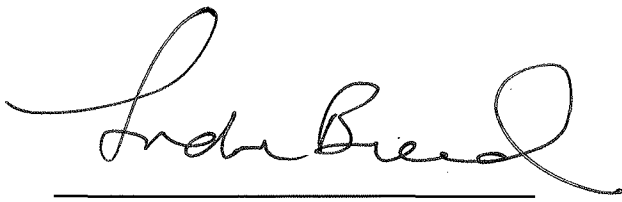
April 04, 2023 Board of Supervisors - ADOPTED

Ayes: 11 - Chan, Dorsey, Engardio, Mandelman, Melgar, Peskin, Preston, Ronen, Safai, Stefani and Walton

File No. 230220

I hereby certify that the foregoing
Resolution was ADOPTED on 4/4/2023 by
the Board of Supervisors of the City and
County of San Francisco.


Angela Calvillo
Clerk of the Board


London N. Breed
Mayor

4/14/23

Date Approved



San Francisco Ethics Commission

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

Phone: 415.252.3100 . Fax: 415.252.3112

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

Received On:

File #: 251006

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
Andrew Strong	628-652-5860
FULL DEPARTMENT NAME	DEPARTMENT CONTACT EMAIL
MYR Mayor's Office of Comm. Dev.	andrew.strong@sfgov.org

5. CONTRACTOR	
NAME OF CONTRACTOR Balboa Gateway LP	TELEPHONE NUMBER 415-321-4057
STREET ADDRESS (including City, State and Zip Code) 350 California Street, 16th Floor, San Francisco, 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) 251006
DESCRIPTION OF AMOUNT OF CONTRACT \$45,721,399		
NATURE OF THE CONTRACT (Please describe) Accept and Expend Resolution for CA HCD AHSC program for a loan and grant amount of \$45,721,399 for a 159-unit affordable housing development known as Balboa Reservoir Building A.		

7. COMMENTS

8. CONTRACT APPROVAL	
This contract was approved by:	
☐	THE CITY ELECTIVE OFFICER(S) IDENTIFIED ON THIS FORM
☒	A BOARD ON WHICH THE CITY ELECTIVE OFFICER(S) SERVES Board of Supervisors
☐	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	Hlebasko	Rebecca	Other Principal Officer
9	Jagodzinski	Mary Jane	Other Principal Officer
10	Haynes Martin	Melissa	Other Principal Officer
11	Neufeld Paul	Susan	Other Principal Officer
12	Williams	Natalia	Other Principal Officer
13	Lund	Erik	Other Principal Officer
14	Estrada-Nino	Maria	Other Principal Officer
15	Hahn	Tina	Other Principal Officer
16	Hesse	Thomas	Other Principal Officer
17	Miranda	Kristine	Other Principal Officer
18	Novak	Kenneth M.	Board of Directors
19	Grodahl	Skip	Board of Directors

9. AFFILIATES AND SUBCONTRACTORS

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

#	LAST NAME/ENTITY/SUBCONTRACTOR	FIRST NAME	TYPE
20	Quinn	Adrienne 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			
46			
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.

SIGNATURE OF CITY ELECTIVE OFFICER OR BOARD SECRETARY OR CLERK

DATE SIGNED

BOS Clerk of the Board

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 A –
\$45,721,399
DATE: October 7, 2025

Resolution authorizing the Mayor's Office of Housing and Community Development ("MOHCD") to execute the Standard Agreements with the California Department of Housing and Community Development ("HCD") under the Affordable Housing and Sustainable Communities Program for a total award of \$45,721,399, including \$33,000,000 disbursed by HCD as a loan to the Balboa Gateway, L.P. ("Developer") for a 100% affordable housing project at 11 Frida Kahlo Way and \$12,721,399 to be disbursed as a grant to the City for public transportation improvements near 11 Frida Kahlo Way, for the period starting on the execution date of the Standard Agreements to November 30, 2043; authorizing MOHCD to accept and expend the grant of up to \$12,721,399 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