

## Application Part A: Qualifications of Team

### A. 1 Developer Qualifications

#### A.1.1 Identify the Entity responsible for development of the Homekey Opportunity Site

A.1.1.1 Legal name

A.1.1.2 Type of entity

A.1.1.3 Taxpayer identification number

A.1.1.4 Address of Office

A.1.1.5 Website

A.1.1.6 Total completed affordable housing properties:                      Total units completed:

A.1.1.7 Years of experience in affordable housing development in San Mateo County:

A.1.1.8 Is the Entity an affiliate of another organization?      YES      NO

If yes, describe:

**A.1.2 Identify the Developer Project Lead** (the person designated by the Developer Entity to complete relevant sections of the Homekey 3.0 application, oversee the acquisition and development of the Opportunity Site and coordinate with other members of the Team and with County staff)

A.1.2.1 Name and Title

A.1.2.2 Years with the company

A.1.2.3 Address

A.1.2.4 Telephone number

A.1.2.5 E-mail address

A.1.2.6 Briefly describe the **experience and qualifications** of the Developer Project Lead.

A.1.2.7 Briefly describe the **availability of the Developer Project Lead** immediately to work with the County to complete relevant sections of the Homekey 3.0 application. When would the Project Lead be available to begin and how much time would be committed up to the submission of the Homekey 3.0 application? How much time would be committed after an award of Homekey 3.0 funds to oversee the purchase, renovation and occupancy of the Opportunity Site?

**A.1.3 Identify the Developer’s Construction Management staff** (the person identified by the Developer entity to estimate rehab costs, identify and negotiate with subcontractors, and provide hands-on supervision of the rehabilitation of the Opportunity Site)

A.1.3.1 Name and Title

A.1.3.2 Years with the company

A.1.3.3 Address

A.1.3.4 Telephone number

A.1.3.5 E-mail address

A.1.3.6 Briefly describe the **experience and qualifications** of the Construction Management staff.

A.1.3.7 Briefly describe the **availability** of the Construction Management staff immediately to work with the County to secure rehabilitation cost estimates necessary for the Homekey 3.0 application. When would the Construction Management staff be available and how much time would be committed prior to the submission of the Homekey 3.0 application? How much time would be committed to finalizing construction contracts and overseeing rehabilitation after an award of Homekey 3.0 funds?

**A. 1.4 Track Record of the Developer:** List the name, city and number of units of *three affordable housing projects completed in the last ten years* with affordability restrictions, serving people experiencing homelessness or at risk of homelessness and implementing Housing First principles. Note that **experience with Housing First principles is a Homekey requirement.**

Property Name			
City			
Total Number of Units			
Date Placed in Service			
30% AMI units (number)			
50% AMI units (number)			
Homeless units (number)			
At risk homeless (number)			
Homekey? (yes/no)			
Rehab other property type?			
Federal financing program?			
Used CES for referrals?			
Followed Housing First?			

**A.1.5 Project Management Approach:** How will the Developer coordinate the efforts of other Team members and the County staff up to the time of the submission of the Homekey 3.0 application and after a Homekey 3.0 award is received? Describe any prior collaborations with either or both the Property Management Entity and the Supportive Services Entity and how you managed the work.

**A.1.6 Community Engagement Plan:** Briefly describe the approach to engaging the community in planning the development of the Homekey Opportunity Site. At what stage of the process will members of the target population and Community-Based Organizations (CBOs) serving the target population be engaged to develop the vision for the Homekey Opportunity Site and respond to proposals? How will people with lived experience of homelessness participate in your planning process.

## **A.2 Property Management Qualifications**

### **A.2.1 Identify the Entity Responsible for Property Management of the Homekey Opportunity Site**

A.2.1.1 Legal name

A.2.1.2 Type of entity

A.2.1.3 Taxpayer identification number

A.2.1.4 Address

A.2.1.5 Website

A.2.1.6 Total number affordable housing properties/units currently under management

A.2.1.7 Years of experience managing affordable housing properties in San Mateo County

A.2.1.8 Is the Entity an affiliate of another organization?      YES      NO

If yes, describe:

**A. 2.2 Identify the Property Management Lead** (the person designated by the Property Management Entity to complete relevant sections of the Homekey 3.0 application and coordinate with other Team members and County staff for the lease-up and ongoing operation of the Homekey Opportunity Site)

A.2.2.1 Name and Title

A.2.2.2 Years with the company

A.2.2.3 Address

A.2.2.4 Telephone number

A.2.2.5 Email address

A.2.2.6 Briefly describe the experience and qualifications of the Property Management Lead

A.2.2.7 Describe **the availability of the Property Management Lead** immediately to work with the County to complete relevant sections of the Homekey 3.0 application. When would the Property Management Lead be available to begin and how much time would be committed to preparing relevant sections of the Homekey 3.0 application? How much time would be committed after an award of Homekey 3.0 funds to oversee the plan for occupying the Opportunity Site in accordance with Homekey requirements?

**A.2.3 Track Record of the Property Management Entity:** List the name, city and number of units of *three affordable housing projects under management in the last ten years* with affordability restrictions, serving people experiencing homelessness or at risk of homelessness and implementing Housing First principles. Note that **experience with Housing First principles is a Homekey requirement.**

Property Name			
City			
Total Number of Units			
Dates under management			
30% AMI units (number)			
50% AMI units (number)			
Homeless units (number)			
At risk homeless (number)			
Homekey? (yes/no)			
Used CES for referrals?			
Followed Housing First?			

**A.2.4 Property Management Staffing Plan:** Briefly describe the number and roles of property management personnel who would be assigned to a Homekey Opportunity Site prior to and upon completion of construction, assuming specific staff/unit ratios. How would the staffing plan vary depending on the number of units, the target population and the extent of supportive services committed to the site?

**A.2.5 Site Security:** Briefly describe the property manager’s experience with and approach to managing properties that required more resources for site security. What cost-effective approaches and resources may be used to enhance residents’ safety and security?

**A.2.6 Approach to Coordination with Service Provider:** Briefly describe the communication methods, cross-training, information-sharing and other protocols that will be followed to enhance working relationships with the Supportive Services Entity prior to and after commencement of occupancy.

**A.3 Supportive Services Qualifications**

**A.3.1 Identify the Entity Responsible for Supportive Services at the Homekey Opportunity Site**

A.3.1.1 Legal name

A.3.1.2 Type of entity

A.3.1.3 Taxpayer identification number

A.3.1.4 Address

A.3.1.5 Website

A.3.1.6 Total number of housing properties/units currently supported:

A.3.1.7 Years providing supportive services at affordable housing sites in San Mateo County

A.3.1.8 Is the Entity an affiliate of another organization?      YES      NO

If yes, describe:

**A.3.2 Identify the Supportive Services Lead** (the person designated by the Supportive Services Entity to complete relevant sections of the Homekey 3.0 application and coordinate with other Team members and County staff for the housing stability of the residents occupying the Homekey Opportunity Site)

A.3.2.1 Name and Title

A.3.2.2 Years with the company

A.3.2.3 Address

A.3.2.4 Telephone number

A.3.2.5 E-mail address

A.3.2.6 Describe the **experience and qualifications of the Supportive Services Lead**

A.3.2.7 Describe **the availability of the Supportive Services Lead** immediately to work with the County to complete relevant sections of the Homekey 3.0 application. When would the Supportive Services Lead be available to begin and how much time would be committed to prepare relevant sections of the Homekey 3.0 application? How much time would be committed after an award of Homekey 3.0 funds to oversee the plan for occupying the Opportunity Site in accordance with Homekey requirements?

**A.3.3 Track Record of the Supportive Services Entity:** List the name, city and number of units of *three affordable housing projects (may include shelters and transitional housing) at which you provided onsite supportive services in the last ten years* with affordability restrictions, serving people experiencing homelessness or at risk of homelessness and implementing Housing First principles. Note that **experience with Housing First principles is a Homekey requirement.**

Property Name			
City			
Total Number of Units			
Dates of supportive service			
Type of property			
30% AMI units (number)			
50% AMI units (number)			
Homeless units (number)			
At risk homeless (number)			
Homekey? (yes/no)			
Used CES for referrals?			
Followed Housing First?			

**A.3.4 Supporting Services Staffing Plan:** Describe expected onsite case management staffing ratios, supervision and other positions dedicated to supporting residents at a Homekey site. How will staffing differ depending on number of units and target population. How are onsite staff supported to implement Housing First principles, trauma-informed, culturally and linguistically competent care.

**A.3.5 Approach to Coordination:** Describe the Supportive Services Entity’s strategy for effective communication and collaboration with (a) the property manager; (b) the Coordinated Entry system; and (c) off-site service providers including County agencies.

#### **A.4 REQUIRED ATTACHMENTS FOR APPLICATION PART A TEAM QUALIFICATION**

    **A.4.1 Executed Memorandum of Understanding** among all the entities participating in the Applicant Team, describing the roles and responsibilities of each Team member, authorizing the submission of the Team’s response to the County’s RFP, and agreeing to the required Acknowledgments and Agreements included in the RFP.

#### **A.4.2 Developer Entity Corporate Documents**

       **A.4.2.1** Articles of Incorporation as certified by the CA Secretary of State, and any Certificates of Amendment or Restated Articles of Incorporation

       **A.4.2.2** Bylaws and any amendments thereto as certified by the corporate secretary.

       **A.4.2.3** Statement of Information on CA Secretary of State Form SI-100 or SI-200

       **A.4.2.4** Certificate of Good Standing certified by the CA Secretary of State

       **A.4.2.5** Shareholder Agreements under Corp. Code Section 186, if applicable

       **A.4.2.6** Any Secretary of State filings relevant to mergers, conversions or re-organizations

       **A.4.2.7** Organizational Chart

       **A.4.2.8** STD-204 Completed Payee Data Record (available on the Homekey website)

       **A.4.2.9** Audited Financial Statements for the most recent two years

       **A.4.2.10** IRS Section 501(c)(3) Determination Letter if tax exempt

       **A.4.2.11** Certificates of General Liability, Automobile Liability and Property Insurance with coverage meeting Homekey minimum requirements (available on the Homekey website)

#### **A.4.3 Property Management Entity Corporate Documents**

       **A.4.3.1** Articles of Incorporation as certified by the CA Secretary of State, and any Certificates of Amendment or Restated Articles of Incorporation

       **A.4.3.2** Bylaws and any amendments thereto as certified by the corporate secretary.

       **A.4.3.3** Statement of Information on CA Secretary of State Form SI-100 or SI-200

       **A.4.3.4** Certificate of Good Standing certified by the CA Secretary of State

       **A.4.3.5** Shareholder Agreements under Corp. Code Section 186, if applicable

       **A.4.3.6** Any Secretary of State filings relevant to mergers, conversions or re-organizations

       **A.4.3.7** Organizational Chart

       **A.4.3.8** STD-204 Completed Payee Data Record (available on the Homekey website)

       **A.4.3.9** Audited Financial Statements for the most recent two years

       **A.4.3.10** IRS Section 501(c)(3) Determination Letter if tax exempt

A.4.3.11 Certificates of General Liability, Automobile Liability and Property Insurance with coverage meeting Homekey minimum requirements (available on the Homekey website)

**A.4.4 Supportive Services Entity Corporate Documents**

A.4.4.1 Articles of Incorporation as certified by the CA Secretary of State, and any Certificates of Amendment or Restated Articles of Incorporation

A.4.4.2 Bylaws and any amendments thereto as certified by the corporate secretary.

A.4.4.3 Statement of Information on CA Secretary of State Form SI-100 or SI-200

A.4.4.4 Certificate of Good Standing certified by the CA Secretary of State

A.4.4.5 Shareholder Agreements under Corp. Code Section 186, if applicable

A.4.4.6 Any Secretary of State filings relevant to mergers, conversions or re-organizations

A.4.4.7 Organizational Chart

A.4.4.8 STD-204 Completed Payee Data Record (available on the Homekey website)

A.4.4.9 Audited Financial Statements for the most recent two years

A.4.4.10 IRS Section 501(c)(3) Determination Letter if tax exempt

A.4.4.11 Certificates of General Liability, Automobile Liability and Property Insurance with coverage meeting Homekey minimum requirements (available on the Homekey website)

**A.4.5 Resume of the Individual designated to act as the lead in communicating with the County**

**IF YOU DID NOT CHECK A REQUIRED ATTACHMENT, PLEASE EXPLAIN YOUR REASON WITH REFERENCE TO THE ATTACHMENT NUMBER:**



## **A.5 OPTIONAL ATTACHMENTS FOR PART A TEAM QUALIFICATION**

A.5.1 **Statements of Qualification** or brochures describing organizational members of the Team.

A.5.2 **Individual resumes** of other key individuals participating in the Team (construction management lead, property management lead, supportive services lead).

A.5.3 A **more extensive list of relevant affordable housing properties** developed, managed, or supported by organizational members of the Team (in addition to the minimum number required to be listed in the Application).

A.5.4 **Other (please describe:)**