



# Elmonica Station Affordable Housing Development Opportunity



Request for Qualifications and Development  
Concepts

November 2, 2020



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## INTRODUCTION

Metro and the City of Beaverton are excited to extend this request for qualifications and concepts for qualified teams (hereafter, “Developer” or “Development Team”) to develop affordable housing on the Elmonica Station Opportunity Site. The 1.07-acre property is located at 17030 SW Baseline Road on the southwest corner of W Baseline Road and SW 170<sup>th</sup> Avenue, less than 0.2 miles from the Elmonica Station Park and Ride. Metro and the City of Beaverton are seeking a team that can deliver approximately 60 to 80 affordable units, including at least 28 units at 30% of Area Median Income or less and at least 29 units of two bedrooms or more. To achieve this goal, Metro and the City of Beaverton have committed to a full land value write-down on the site as well as a commitment of up to \$11.9 million in Regional Housing Bond funds and eight Project Based Vouchers (PBVs). A summary of this project’s requirements is below:

<b>PROJECT REQUIREMENTS</b>	
Maximum subsidy/unit	\$150,000
Total unit target	60 – 80 units
30% AMI units	28 units
Family sized units (2+ Bedroom)	29 units
Project Based Vouchers	8 PBVs  The PBV units should be programmed for family-sized units (2-bedrooms or more)  PBV units must be made available through referrals from the Housing Authority of Washington County.
Programming	All units restricted at or below 60% AMI  Programming appropriate to target population
Screening	Use low barrier screening criteria that balances access to target populations, project operations, and community stability  Beaverton and Metro will review and may request revisions to screening criteria and lease up process
COBID participation	A detailed plan to achieve at least 20% COBID certified construction participation, and 20% COBID certified design professional services participation

	If the plan includes a significant partnership with a trade association/consultant, such plan should include in detail the expected division of work
Sustainability	Compliance with Oregon Housing and Community Services standards
Accessibility	Universal design principals
Design	Quality design, aesthetics, and material
Funding Sources	Successful respondents will utilize a combination of capital funding sources, including but not limited to: respondent's equity, Regional Housing Bond funds, Section 42 Low Income Housing Tax Credit (LIHTC) equity, a mortgage and conventional construction and permanent financing sources
Leverage	Maximization of all non-Bond sources of funding including use of Low-Income Housing Tax Credit equity and conventional debt to the greatest extent feasible
Beaverton Local Implementation Strategy (LIS) Alignment	Respondents must demonstrate alignment with the LIS and their support of this commitment in as many aspects of a project proposal as possible, including but not limited to development team, project contractors, vendors, resident and supportive services, marketing, leasing, and operations components.

## PURPOSE AND GOALS

### Metro Affordable Housing Bond Program

Metro and the City of Beaverton intend to support development at the Opportunity Site with funds from the Regional Affordable Housing Bond Program and are seeking proposals consistent with the Metro's Guiding Principles and the City of Beaverton's Housing Bond Local Implementation Strategy (LIS).

### Metro Guiding Principles

In its efforts to achieve unit production targets, Metro's Regional Affordable Housing Bond Program is guided by the following four principles:

- **Lead with racial equity.** Ensure that racial equity considerations guide and are integrated throughout all aspects of the Program implementation, including community engagement, project location prioritization, tenant screening and marketing, resident and/or supportive services, and inclusive workforce strategies

- **Create opportunity for those in need.** Ensure that Program investments serve people currently left behind in the region’s housing market, especially communities of color, families with children and multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement. Incorporate commitments for tracking and reporting on Program outcomes for people of color and other historically marginalized groups.
- **Create opportunity throughout the region.** Ensure that Program investments are distributed across the region to (a) expand affordable housing options in neighborhoods that have not historically included sufficient supply of affordable homes, (b) increase access to transportation, employment, education, nutrition, parks and natural areas, and (c) help prevent displacement in changing neighborhoods where communities of color live today.
- **Ensure long-term benefit and good use of public dollars.** Provide for community oversight to ensure transparency and accountability in Program activities and outcomes. Ensure financially sound investments in affordable, high quality homes. Allow flexibility and efficiency to respond to local needs and opportunities, and to create immediate affordable housing opportunities for those in need.

### **Beaverton Local Implementation Strategy**

In addition to Metro’s Regional Housing Bond Program Guiding Principles, the City of Beaverton completed a thorough, community-focused process to develop its [Local Implementation Strategy](#) (LIS) (Appendix A). The LIS aims to sustain Beaverton’s livability, particularly for those most in need. The LIS guides the City’s efforts as it works to create affordable housing using its allocation of Housing Bond proceeds. The LIS also outlines a commitment to furthering community goals of preventing displacement, advancing racial equity and inclusion, creating affordable housing options in locations where there are none, and helping address homelessness in the community. Priorities identified in the LIS include:

- Lead with racial equity and inclusion
- Use a portfolio approach to achieve established goals
- Leverage publicly owned land
- Ensure investments are made in the following areas:
  - High net-worth areas with limited or no affordable housing options;
  - Consider school catchment areas, planned transit and planned infrastructure improvements.

All proposals will be evaluated based on Metro and Beaverton’s implementation strategies that would benefit communities in desperate need of housing.

## **NEIGHBORHOOD CONTEXT**

### **City of Beaverton**

The City of Beaverton is located in the heart of the Tualatin Valley, midway between Mt. Hood and the Oregon coast, just seven miles immediately west of Portland, Oregon. Beaverton is Oregon's sixth largest city and the second largest incorporated city in Washington County. The City is located 20 miles from the Portland International Airport or eight miles from Hillsboro airport, all of which are easily accessed via multiple modes of transportation. Beaverton combines the best of a big city with the peaceful surroundings of a small town.

Beaverton is home to more than 98,000 people of all ages and backgrounds. One in three Beaverton residents identify as a person of color, roughly 20 percent were born outside of the U.S. and more than 100 languages are spoken in the Beaverton School District. This richness of cultural diversity is what makes Beaverton such a vibrant city. Unfortunately, over 45% of renting households in Beaverton are rent burdened paying over 30% of their income in rent costs.

### **Elmonica Station Area**

The site is less than 0.2 miles north of the Elmonica/SW 170<sup>th</sup> MAX station, which connects the area with regular transit service throughout the larger Portland Metro area. Redevelopment efforts in this area are focused around the light-rail station to provide a higher density of development with a focus on housing. Mixed-use development is encouraged to include a mix of housing and commercial uses, similar to the project north of the site which contains multiple ground floor retail businesses with residential units above.

### **Nearby Amenities**

- **Schools** - Beaverton School District is the third largest district in Oregon and is nationally acclaimed for their students' high SAT scores. Beaverton schools have formed strong partnerships with the business community. Beaverton is also home to several highly regarded private schools and some of the region's best state and private universities and community colleges are located within 30 miles of Beaverton. Public schools serving the site include: Beaver Acres Elementary School, 5 Oaks Middle School, and Aloha High School.
- **Parks** - There are over 100 parks within 1,000 acres of the city, a park within a half mile of every home, 30 miles of hiking trails and a 25-mile network of bike paths. The City has a partnership with Tualatin Hills Park and Recreation District (THPRD) who is the park provider for the city. Parks within the immediate vicinity include: the Waterhouse Powerline Park, Parr Park, Tualatin Hills Park, Vendla Park, and Tualatin Hills Nature Park.
- **Full service grocery stores** - The site is centrally located with multiple grocery stores within less than 2 miles including but not limited to Fred Meyer, India Supermarket, Apna Bazaar Indian Store, Walmart Neighborhood Market, Manila Market, India Sweets & Spices, Can Tho Market, Grocery Outlet, and Costco.
- **Employers** - Major employers in the general surrounding area include Nike, Intel, Tektronix, Cascade Microtech, Columbia Sportswear, Providence St. Vincent Hospital, in addition to many high-tech companies.
- **Transit routes** - The site is located at the corner of SW Baseline Road and SW 170<sup>th</sup> Avenue with the Elmonica/SW 170<sup>th</sup> Avenue light rail station less than 1,000 feet south. This station



is serviced by the Blue Line and includes a park and ride. Nearby bus routes include the #67 on 158<sup>th</sup>, #59 on Walker, and #52 on 185<sup>th</sup> and multiple routes are easily accessed via the stops along the light rail. TriMet’s “A Better Red” project will expand Red Line service to Elmonica Station, which will increase travel service to Downtown Portland and Hillsboro while adding direct service to Portland International Airport (PDX). TriMet anticipates “A Better Red” will be complete in 2023 or 2024.

## **SITE INFORMATION**

The 1.07 acre Elmonica Station Site (“the Site”) is located at 17030 SW Baseline Road in Beaverton, Oregon and within a HUD-designated Qualified Census Tract (QCT). The Property is zoned Station Community Multiple Use (SC-MU). SC-MU zones are generally located within one-half mile of light rail platforms and permit office retail, service, and residential uses. A minimum density of at least 24 residential units per acre is required and there is no maximum units per acre for residential-only projects. The baseline parking requirement in the SC-MU zone is one space per unit, however reductions to the parking ratio are possible if a project can prove reduced need through an adjustment process. Previous affordable housing developments within the City of Beaverton have shown precedent in reducing parking ratios to 0.75 per unit given proximity to transit and the increased transit demand from lower income residents. The SC-MU allows a maximum building height of up to 100 feet within 1,320 feet of a MAX station platform.

### **Site Access and Connectivity**

Both SW 170<sup>th</sup> Avenue and SW Baseline Road are managed by Washington County and not the City of Beaverton. Existing Baseline Road access is located at the Property’s northwestern most corner. County staff indicate that left turns are unlikely to be allowed here and automobile movement will be restricted to right turns only. There is additional automobile access onto SW 170<sup>th</sup> Ave. at the eastern most portion of the site. This access will also likely be right-in-right-out only due to proximity to the Baseline intersection.

There are currently no sidewalks on the west side of 170<sup>th</sup> Ave. leading down to the Elmonica MAX Station. Pedestrians currently need to cross to the east side of 170<sup>th</sup> Ave. at Baseline to access sidewalks to the station. The developer will be responsible for building new sidewalks along the Site’s perimeter. A future pedestrian crossing may be allowed across 170<sup>th</sup> Ave, midway between the light rail tracks and Baseline Road at the entrance to TriMet’s park and ride, pending the future development of the land surrounding the Site. The remaining sidewalks on the west side of 170<sup>th</sup> Ave will be built as the land to the south of the Site develops.

### **Property Development Constraints**

Metro and Beaverton staff anticipate that the Property’s development envelope may be reduced due to required right-of-way (ROW) and utility impacts. During discussions about a future development on the Property prior to release of this RFQ, Washington County Transportation staff indicated that a right turn deceleration lane may be required from eastbound Baseline Road onto southbound 170<sup>th</sup> Ave. This right turn lane would need to begin 300 feet from the intersection and would extend across the entire northern portion of the Property. Washington County Transportation staff anticipate that the existing 45 feet from centerline of ROW that currently exists

on Baseline Rd would need to be expanded to 61 feet in order to accommodate this 10 foot turn lane and widened sidewalk. Along 170<sup>th</sup> Avenue, Washington County Transportation staff indicated that 45 feet of ROW from centerline will be required. The Property boundaries already reflect this dedication, however the ultimate width of the future sidewalk may require additional ROW. Refer to the map below or Appendix B for an illustration of the anticipated ROW impacts.

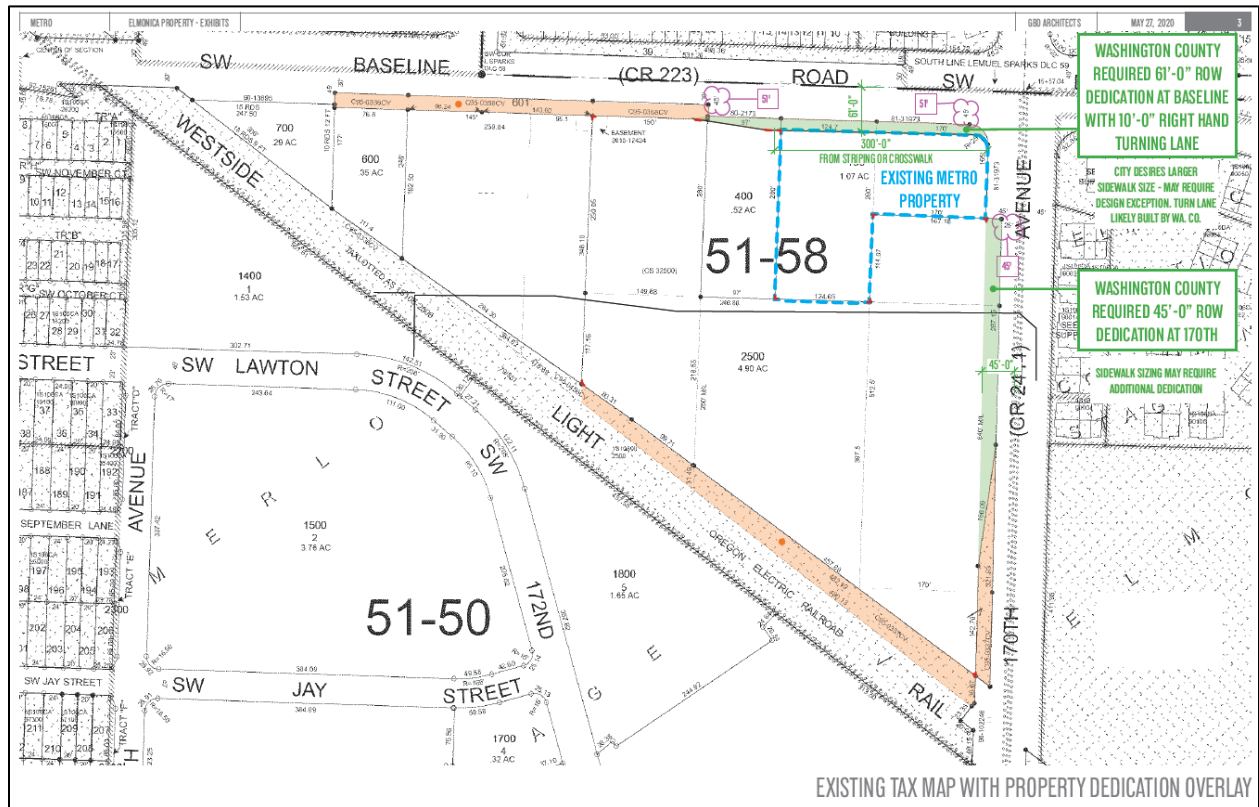


Figure 1: Property Acquisition Overlay (also included as Appendix B)

In addition to ROW constraints, the west side of 170<sup>th</sup> Ave is impacted by existing power lines that will require relocation underground according to Portland General Electric (PGE). PGE has indicated it will pay for new facilities and for the labor to underground the power lines, however they will require that a pathway along the site be provided for the new lines. PGE staff anticipate that the lines will fit under the existing ROW dedicated at 170<sup>th</sup> Ave, however a new electrical vault will need to be installed near the corner of Baseline Road and 170<sup>th</sup> Ave. This vault will need an 8 foot clearance along each side to ensure proper maintenance access.

### Environmental

A Phase II Environmental Site Assessment (Appendix C) (“ESA”) was completed on the Site by Landau Associates in March 2018. The ESA established the Site as a former gasoline service station and automobile maintenance facility since roughly 1960. Prior to that time, the Site was primarily residential and agricultural. Part of the Site, then known as Setniker’s Auto Repair, was acquired during the expansion of Baseline Road in 1993. As part of this project, five underground storage tanks (UST) were removed from two tank pits at the northern portion of the Site. Two of these tanks were unpermitted but considered exempt from decommissioning reports. Oregon

Department of Environmental Quality (DEQ) issued a No Further Action (NFA) determination based on soil samples collected at the time.

While completing Baseline Road ROW improvements in 1995, TriMet encountered petroleum contaminated soil near one of the former tank pits. Over 22 tons of contaminated soil were excavated and disposed of offsite. DEQ reopened the site in 1996 and requested further information from the contractor that removed the USTs prior to the ROW work. DEQ determined that the contamination was the responsibility of the property owner but the owner could not pay for additional evaluation or remediation work.

After a change in petroleum-contaminated site evaluation criteria, DEQ issued a No Further Action letter (NFA) for the Site in 2007. DEQ analyzed soil on the site and detected levels below risk-based concentrations, but no groundwater samples were taken and not all former UST pit locations were sampled. Metro's March 2018 ESA analyzed eight soil samples and eight groundwater samples from the Site. Investigators encountered chemical odors and a petroleum sheen from some borings. Soil analysis encountered concentrations of gasoline and motor oil typical with former automobile service stations. The only compound detected at a concentration greater than the most stringent Risk-Based Concentration (RBC) (leaching into groundwater for residential uses) was gasoline near boring B-5, an existing above ground storage tank. The detected level of contaminants was below the RBC for vapor intrusion into residential buildings. The detected concentrations of contaminants were all below what was originally reported in the existing no further action letter, suggesting natural attenuation is occurring. Groundwater analysis detected concentrations of gasoline and oil contaminants above the most stringent RBC for ingestion of tap water, however any new construction would most likely connect to the municipal system.

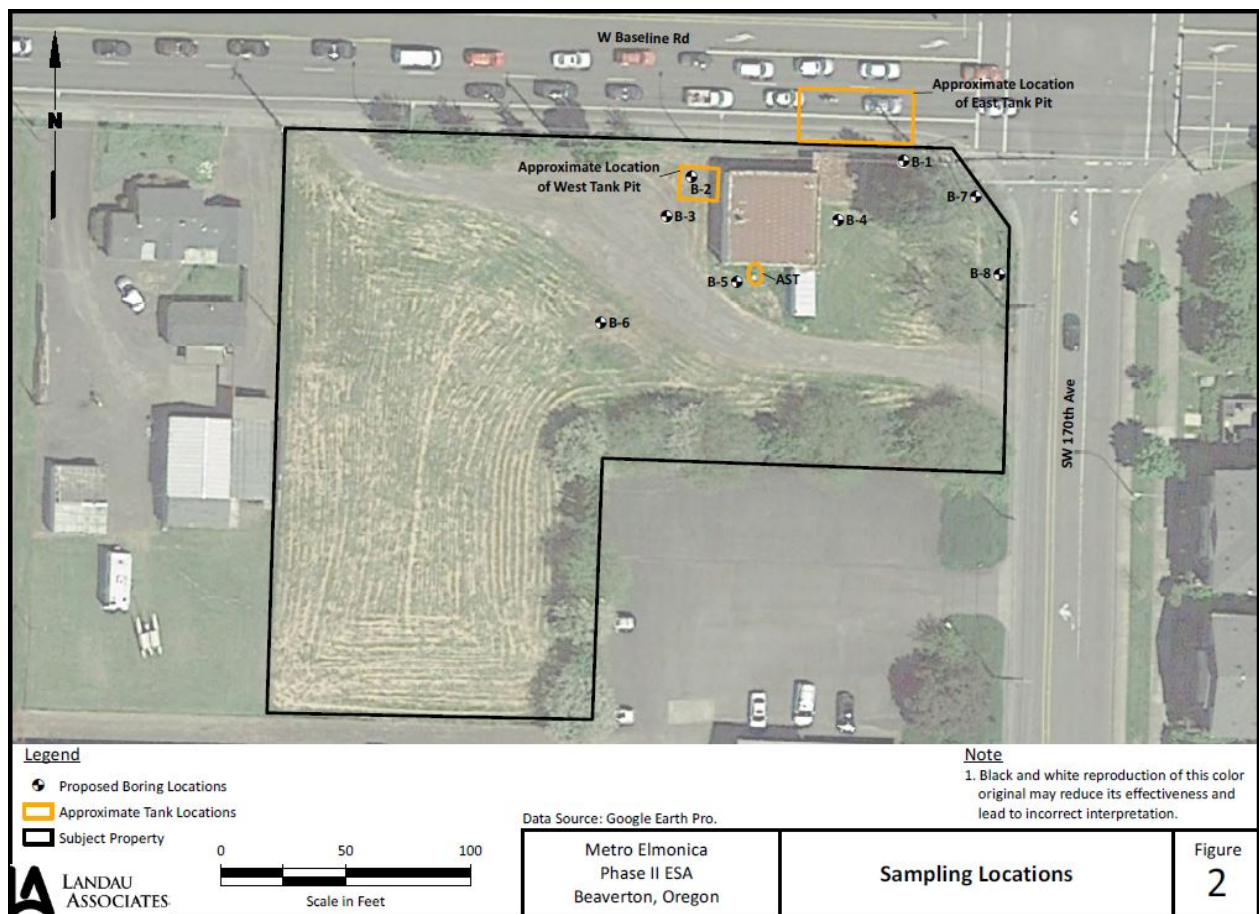


Figure 2: Elmonica ESA Sampling Locations (also included in Appendix C)

An unoccupied 1,525 square foot auto repair shop building remained on the Site's northeast corner after Metro purchased the property. After a hazardous materials survey that discovered asbestos and lead-based paint, Metro demolished the building and disposed of sensitive materials in November 2019. During the demolition process Metro discovered a previously unknown septic tank on the Site and decommissioned it. To the best of Metro's knowledge, a concrete slab from the previous building and capped sewer lines are all that remain on the Site today.

## Adjacent Development

Property adjacent to the Site is currently under contract by AG Spanos Companies (Spanos) for the purpose of developing market-rate multifamily housing. Spanos representatives have approached Metro and the City of Beaverton and expressed interest in partnering with the eventual developer of the Site in the form of a land swap or other joint venture. Teams responding to this RFQ will only be evaluated based on their approach to developing the Metro-owned site and not their willingness to partner with Spanos or possible joint-venture alternatives.

However, the selected developer will have the opportunity to explore development options with Spanos after the completion of this RFQ process.

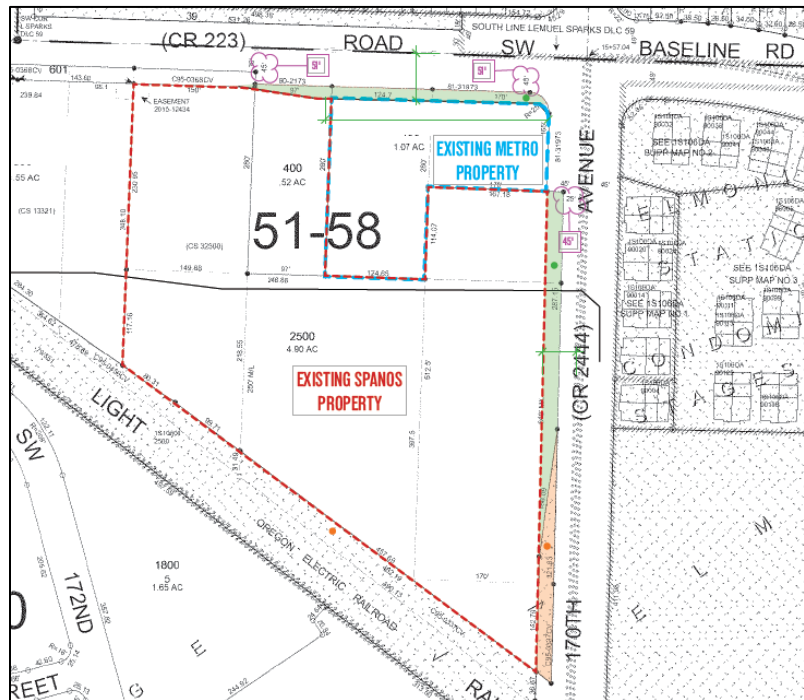


Figure 3: Adjacent Property Ownership

## FINANCIAL INCENTIVES

The selected development team and concept will be eligible to apply for Regional Housing Bond funds. To support development of affordable housing at the Elmonica site, The City of Beaverton and Metro have combined to commit up to **\$11.9 million and 8 PBVs to support the achievement of at least 28 units of 30% AMI housing, 50% family units of two bedrooms or more, and 60 – 80 total units at 60% of AMI or less.** The selected development team will negotiate a single funding agreement with the City of Beaverton. The funding commitment will be subject to administrative approval by Metro through a two-stage Concept Endorsement and Final Approval process. The selected development team will also negotiate a purchase and sale agreement for the transfer of the property with Metro.

In addition to the Regional Housing Bond funds, Metro’s Transit Oriented Development (“TOD”) Program supports new higher-density development near high frequency and high capacity transit lines that generates more transit trips than would otherwise be generated by development at the lower densities supported by current market conditions. Metro has two complementary mechanisms to support higher-density redevelopment of the sites: 1) land value write down, and 2) purchase of a TOD easement. Metro expects to fully write down the value of the land to \$0 based on a supporting appraisal that considers the affordable unit requirements. An affordable housing project at the Elmonica site could qualify for \$250,000 to \$500,000 in Metro TOD program support. The developer would need to apply to the Metro TOD program separately and funding approval

would be subject to the program's work plan and approval process. While the actual TOD Program eligibility and funding level will be subject to a separate review and approval by Metro, for purposes of preparing responses to this solicitation however, teams may assume a TOD program contribution of \$300,000.

It is also expected that the selected team will pursue 4% LIHTC and other outside funding sources that may be available.

Interested parties are advised that, when combined with other forms of public financial support, the commitment of these Metro financial resource tools may result in the application of Oregon prevailing wage laws to the project under ORS 279C.800-810, *et seq.* if the combined BOLI eligible public support exceeds \$750,000.

## **TIMELINE AND PROCESS**

### **Step 1. Registration**

In order to ensure that all interested parties receive notification of any clarifications or changes to the request for qualifications, interested parties should register their interest in submitting qualifications and concepts along with any questions or requests for clarification by an e-mail to Jon Williams, Senior Development Project Manager, at [jonathan.williams@oregonmetro.gov](mailto:jonathan.williams@oregonmetro.gov) no later than **November 13, 2020 at 5:00 pm** PST. Metro will share responses to questions or requests for clarification in an e-mail to all registered parties.

### **Step 2. Submission of qualifications**

Submission must be received no later than **Monday, January 15, 2021 at 5:00 pm** PST. Responses must be submitted in PDF format via e-mail to [jonathan.williams@oregonmetro.gov](mailto:jonathan.williams@oregonmetro.gov). Files larger than 10 megabytes should be submitted via download link or compressed. Late responses will be disqualified.

### **Step 3. Advisory Committee developer recommendation**

Submissions will be reviewed by an Advisory Committee composed of representatives selected by Metro and the City of Beaverton. If needed, interviews will be held with selected finalists. The Advisory Committee will make recommendations to Metro's Transit Oriented Development Steering Committee and the City Council of the City of Beaverton. The selection must be approved by both organizations to move forward.

### **Step 4. Metro and City of Beaverton approval of recommended development team and concept and execution of Exclusive Negotiating Agreement with Metro**

Following the Advisory Committee's recommendation, Metro will evaluate the recommendations and Team(s) and may enter into an Exclusive Negotiating Agreement ("ENA") setting forth the process for and necessary steps and preconditions that must be satisfied prior to entering into a Disposition and Development Agreement. Conditions precedent to Metro approval of the Team include:

- Metro Transit Oriented Development Steering committee endorsement and Chief Operating Officer approval
- City of Beaverton approval of the Team and Concept

Key areas to be addressed in the Exclusive Negotiating Agreement include:

- Exclusive negotiating period and project development timeline
- Commitment to affordability levels, unit production, and bedroom size and mix.
- Commitments for community outreach consistent with City of Beaverton requirements
- Commitments for design consultation with Metro Transit Oriented Development Steering Committee
- Parameters for land value write down and Transit Oriented Development program funding contribution
- Benchmarks for entering into a Disposition and Development Agreement

### **Step 5. Concept Endorsement and preliminary commitment of Regional Housing Bond Funds**

Concurrently with the approval of the ENA and following endorsement of the development team and concept, Metro will provide a Concept Endorsement providing a preliminary commitment of Regional Housing Bond funds to the project conditioned upon the final project achieving the unit production targets committed to in the ENA and the project’s compliance with the City of Beaverton’s Local Implementation Strategy.

### **Step 6. Project development and funding commitments**

Upon achievement of certain development benchmarks to be described in the ENA, Metro anticipates that the Exclusive Negotiating Agreement will be replaced by a Disposition and Development Agreement which will describe the conditions for releasing the Elmonica site for construction of affordable housing and the release of Transit Oriented Development Funds to the project (if any.)

Separately, the City of Beaverton will enter into a project funding agreement with the developer which will govern the contribution of Regional Affordable Housing Bond fund to the Project.

### **Summary**

The timeline for the Request for Qualifications is below:

- November 2, 2020 - Issue RFQ
- November 13, 2020, 5:00 p.m. PST - Deadline to register for online information session and submit questions to be addressed during information session. Parties should register and submit questions by e-mailing Jon Williams at [jonathan.williams@oregonmetro.gov](mailto:jonathan.williams@oregonmetro.gov).
- November 18, 2020, 10:00 a.m. PST - Optional online information session—Details to be provided to registered interested parties. Metro to provide written response to submitted questions to all registered participants.
- **January 15, 2021, 5:00 p.m. PST - RFQ closes. Parties should submit responses in PDF format to [jonathan.williams@oregonmetro.gov](mailto:jonathan.williams@oregonmetro.gov).**
- Week of January 25, 2020 – Target date for review of Submissions

- Week of February 1, 2020 – Target date for interviews (if needed)

## **SUBMISSION MATERIALS AND SCORING**

Required submission materials are summarized below, followed by additional detail and proposed scoring. Submissions deemed incomplete may be disqualified at the sole discretion of Metro and City of Beaverton.

### **Submittal Summary**

- Introductory letter including:
  - Summary of major points within the submission
  - Name of primary contact and contact information for the development team
  - Statement explicitly agreeing to the General Conditions set forth in this RFQ
  - Dated signature of executive or manager authorized to enter into contracts on behalf of the development team
- Project sheets from previous projects (*maximum three pages*)
- Bios for project manager and identified critical team members (*maximum three pages*)
- Schedule of sponsor's real estate owned
- Audited or certified financial statement from proposing developer
- Project summary describing the team's approach to developing the Elmonica Site (*maximum three pages*)
- Massing drawing and schematic site plan (*maximum two pages*)
- Program summary including unit count/affordability matrix



- Preliminary OHCS pro forma
- Diversity, equity, and inclusion plan (*maximum four pages*)

### **Part 1. Experience (30 points)**

Metro and the City of Beaverton are seeking a team with the capacity and track record of developing high quality affordable housing that promotes racial equity in the design process, construction contracting, and management and marketing. Please provide evidence of your experience developing high quality affordable housing by submitting the following materials.

1. Project sheets from up to three previous affordable housing projects developed by sponsor. Please include address, total budget, unit mix, financial sources used, affordability restrictions (if any), exterior photo, key project team members, and participating COBID certified contractors for each project, including percentage of overall construction cost, names and contract amounts. (*Maximum three pages*)
2. Bios for project manager and identified critical team members along with their proposed roles on this project. (*Maximum three pages*)
3. Schedule of sponsor's real estate owned including debt service coverage ratios, unit count, and current occupancy percentage.
4. Audited or certified financial statement from proposing developer.

### **Part 2. Project concept (25 points)**

Metro and the City of Beaverton are seeking a sponsor with a clear understanding of the site's constraints, the City and Metro's unit production targets, and a realistic approach to the project's financing and sustained operations. Metro and the City are seeking to achieve at least **60 - 80 total units** on the site, including **29 units with two or more bedrooms**. All proposed units must be regulated at 60% of AMI or less and **28 units must be at 30% of AMI or less**. To assist with these requirements, the City of Beaverton and Metro have allocated up to **\$11.9 million** of regional housing funds and **eight PBVs**.

Please provide the following to document your team's anticipated approach to developing the parcel:

1. Narrative summary of the team's approach to developing the Elmonica Site, including description of schematic site plan, programming, financing assumptions, and anything else relevant to achieving the project requirements. Details specific to equity in contracting, screening, and community engagement should be reserved for the Diversity, Equity, and Inclusion Plan and do not need to be addressed in this section. (*Maximum three pages*)
2. Massing drawing and schematic site plan showing potential scale and site configuration. Please be sure to highlight how your site approach addresses vehicle access, onsite parking, and outdoor open space for residents, and responds to known site constraints described in Appendix B. (*Maximum two 8 ½ X 11 sheets*)

3. Program summary matrix describing unit count by bedroom size and affordability level square footage by unit type and approximate square footage of anticipated dedicated community rooms or community open space. (*Maximum one page*)
4. Preliminary 4% OHCS pro forma including anticipated sources and uses (especially any competitive sources) and operating pro forma including any anticipated operating subsidies or vouchers and assumed developer fee and repayment of deferred fee.

**Assumption to use for Metro TOD Easement contribution:** To allow a direct comparison of projects, please assume a TOD Program Contribution of \$300,000 in addition to the \$11.9 million of regional housing funds. *This assumption should be used solely for the preparation of this response. The actual value of any TOD Easement will be subject to review and recalculation by Metro staff based on additional considerations including projected ridership associated with the development program and actual project need.*

### **Part 3. Diversity, equity and inclusion (25 points)**

Metro and the City of Beaverton are committed in ensuring diversity, equity and inclusion concepts are embedded in all affordable housing projects. It is our goal that BIPOC and marginalized communities benefit from this investment throughout the development process and beyond. Development teams should provide a diversity, equity, and inclusion plan that addresses the following (*maximum four pages*):

#### **Community Engagement**

- Propose programming for the site based on serving the target population. Describe the development team’s history of programming similar space that resulted in positive outcomes for residents. Propose a marketing and lease-up plan that demonstrates how the lease-up process ensures equitable access for people of color and marginalized communities for the identified populations, including a low barrier screening process. Describe the team’s experience implementing similar plans.
- Describe the experience and capacity of the proposed service provider team. Discuss how they will support project design, planning and service operations oversight, including the development of contracts and services agreements and the delivery of culturally responsive and/or culturally specific services.

#### **Equity**

The proposed project must show it can meet the 20% COBID hard and soft cost goals. In addition, proposers must describe how equity is addressed throughout their proposals to include:

- How diversity and inclusion is applied in the organization, including its board.
- A resident service plan for the proposed project that is inclusive and applicable to the targeted population.
- The provision of culturally responsive and culturally specific services.

- Discuss examples of previous projects that implemented affirmative actions to promote racial equity through community engagement, construction contracting, and property management and leasing practices.
- Is the Construction Prime Contractor (if selected) a 100% BIPOC (Black, Indigenous, Person of Color) owned firm/BIPOC Prime Contractor?
- In your last three projects, have you worked with a BIPOC Prime Contractor?

**Part 4. Responsiveness to City of Beaverton Local Implementation Strategy (20 points)**

Metro and the City of Beaverton are committed to implementing the values embedded within the City’s Regional Affordable Housing Bond Local Implementation Strategy. Proposed project submissions should meet or exceed the following requirements:

<b>PROJECT REQUIREMENTS</b>	
Maximum subsidy/unit	\$150,000
Total unit target	60 – 80 units
30% AMI units	28 units
Family sized units (2+ Bedroom)	29 units
Project Based Vouchers	8 PBVs  The PBV units should be programmed for family-sized units (2-bedrooms or more)  PBV units must be made available through referrals from the Housing Authority of Washington County.
Programming	All units restricted at or below 60% AMI  Programming appropriate to target population
Screening	Use low barrier screening criteria that balances access to target populations, project operations, and community stability  Beaverton and Metro will review and may request revisions to screening criteria and lease up process
COBID participation	A detailed plan to achieve at least 20% COBID certified construction participation, and 20% COBID certified professional design services participation

	If the plan includes a significant partnership with a trade association/consultant, such plan should include in detail the expected division of work
Sustainability	Compliance with Oregon Housing and Community Services standards
Accessibility	Universal design principals
Design	Quality of design, aesthetics, and material
Funding Sources	Successful respondents will utilize a combination of capital funding sources, including but not limited to: respondent's equity, bond funds, Section 42 Low Income Housing Tax Credit (LIHTC) equity, a mortgage and conventional construction and permanent financing sources
Leverage	Maximization of all non-Bond sources of funding including use of Low-Income Housing Tax Credit equity and conventional debt to the greatest extent feasible
LIS Alignment	Respondents must demonstrate alignment with the LIS and their support of this commitment in as many aspects of a project proposal as possible, including but not limited to development team, project contractors, vendors, resident and supportive services, marketing, leasing, and operations components.

## GENERAL CONDITIONS

1. This RFQ is not a solicitation of competitive proposals or competitive bids. Metro in partnership with the City of Beaverton specifically reserves the right in its sole discretion to determine which development team best satisfies the selection and scoring criteria, and to:
  - Revise the solicitation, evaluation, or selection process including extending the deadline or canceling the process entirely without selecting any Projects, by providing written notice to respondents.
  - Request additional information from any and all prospective Respondents if helpful to clarify any information contained in the proposals.
  - Specify additional terms and conditions at any time either before or after responses are submitted.
  - Accept or reject any one or all proposals received as a result of this RFQ, to waive formalities and irregularities, and to conduct discussions with all responsible respondents, in any manner necessary, to serve the best interest of Metro.
  - Modify the selection process set forth in this RFQ upon written notification to all respondents who have not been rejected at the time of the modification.

- Disqualify **without recourse or appeal** any or all responses to this RFQ, with or without cause.
  - Keep all responses submitted in connection with this RFQ, without restrictions on future use.
  - Determine the timing, arrangement and method of any presentation throughout the process.
  - Verify and investigate the qualifications and financial capacity of the development team, and any of the information provided in the proposal.
2. Every effort has been made to provide current and correct information; however, unless citing a specific Metro approved resolution or plan, Metro makes no representation or warranty with respect to the accuracy of any of the information provided in this RFQ. Respondents are instructed to independently verify all information provided herein.
  3. Development teams may respond to more than one site but are restricted to one response to the RFQ per site.
  4. All responses received will become official public records subject to inspection by the public in accordance with ORS 192.502 and Metro’s public records policy after the completion of the RFQ process; any may be used for any purposes relevant to the decisions and actions undertaken by Metro.
  5. Every effort has been made to include all the information necessary to prepare and submit a comprehensive response to this RFQ. However, in the event additional information is desired, please contact Jonathan Williams, Senior Development Project Manager at [jonathan.williams@oregonmetro.gov](mailto:jonathan.williams@oregonmetro.gov). Any questions and answers will be shared with all applicants.
  6. Development teams are cautioned not to undertake any activities or actions during the course of this RFQ to promote or advertise their proposals except in the course of Metro-authorized presentations; or to make any direct or indirect (through others) contact with evaluation committee members. Failure to abide by these restrictions may be grounds for disqualification.
  7. Metro accepts no responsibility or obligation to pay any costs incurred by any responders in preparing and submitting responses to this RFQ, or submission of a proposal or in complying with any subsequent request by Metro for information or participation throughout the evaluation process.
  8. For a period of one year after their separation from employment, no former Metro employee shall in any way be part of a development team in this RFQ if such employee participated personally and substantially in the proposed project during the employee’s term of employment at Metro. If such employee “exercised contract management authority” in the proposed project, s/he may never be part of a development team in this RFQ for the

proposed project regardless of their length of separation from Metro. Failure to abide by these restrictions is grounds for disqualification.

9. Confidentiality: Developers responding to this RFQ are advised to identify all portions of their submission considered by them to be confidential financial or business information, or trade secrets, by marking them as such in the header or footer of the submission documents. Metro will exert reasonable efforts to protect the confidentiality of said information in accordance with Oregon law, which provides an exception to disclosure under Oregon's public records laws for confidential business and financial information and trade secret submissions. Oregon Public Records law, (ORS Chapter 192) requires public disclosure by Metro of most information held by Metro that is deemed to be "public records" upon request of a member of the public. Metro therefore cannot guarantee that it will protect the confidentiality of Developer's confidential business and financial information and trade secret submissions. If Metro receives a public records request and order by the Multnomah County District Attorney seeking disclosure of such information Metro will, prior to Metro's disclosure, provide Developer with prompt notice of such order or request and, as applicable: (a) provide Developer an opportunity to appeal the District Attorney's decision to the State courts and receive a ruling; or (b) allow Developer to apply for injunctive relief from the applicable Oregon authority to prevent Metro from disclosing such information to a third party.