

**REQUEST FOR INFORMATION AND QUALIFICATIONS
SAN DIEGO STATE UNIVERSITY
MISSION VALLEY RESIDENTIAL AND RETAIL PROJECT # 1**

Date: September 14, 2021
Contacts: Gina Jacobs, Associate Vice President, SDSU Mission Valley
Email: mvresidential@sdsu.edu

DEADLINE FOR QUESTIONS

Wednesday, Sept. 29 at 2:00 p.m. PDT. Please submit all questions **in writing** by submitting them to mvresidential@sdsu.edu.

SUBMITTAL DUE DATE AND TIME

Submittals are due Friday, October 22, at 2:00 PM PDT. Submit one original submittal prior to the date and time specified via email to mvresidential@sdsu.edu. Firms shall respond by email. Any questions, about the submittal process can be directed to mvresidential@sdsu.edu.

San Diego State University (SDSU or University) assumes no responsibility for delay in submission of the response to this Request for Information and Qualifications (RFIQ) electronically. Submittal of responses by mail, personal delivery, courier service, or fax is not acceptable.

RFIQ REQUIREMENTS

Submissions that do not meet minimum requirements, content, and quality standards of this RFIQ, or take exceptions, may be eliminated from further consideration.

San Diego State University encourages the participation of Disadvantaged, Minority-owned, and Women-owned Business Enterprises (D/M/W/BEs) and is committed to promote a diverse pool of firms.

Every effort will be made to ensure that all persons have equal access to future business opportunities with the University within the limits imposed by law or University policy. During the future RFP process, each proposer shall be required to provide a project specific equal employment opportunity policy as an appendix to its Technical Proposal submission.

This RFIQ does not constitute a call for bids, a final contract, or a legal commitment.

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SECTION 100: INTRODUCTION

101. PRE-QUALIFICATION CONFERENCE: SDSU will hold an initial informational pre-submission conference with potential developer teams via Zoom Meeting on Thursday, Sept. 23 at 11:00 a.m. local San Diego time. Potential developer teams are invited to request the Zoom Meeting link by emailing mvresidential@sdsu.edu with the following information:

- Name
- Title
- Company name
- Mailing address
- Phone number
- Email address

SDSU may hold additional joint informational meetings with developer teams at any time prior to the RFIQ submittal due date. At this time, all informational meetings are anticipated to be held virtually.

102. INTENT:

SDSU is requesting information and qualifications from interested entities as a first step toward identifying qualified developers to plan, finance, construct, maintain, operate, and derive income from the operation of one of several private development projects on property owned by the Trustees of the California State University (CSU or CSU Board of Trustees) located at the SDSU Mission Valley site (Mission Valley Site) in San Diego, California.

The Mission Valley Residential and Retail Project #1 (hereinafter the Project) will consist of two residential parcels totaling approximately 4.24 acres, and up to 30,000 square feet of retail space, located on one full block along Innovation Parkway, the main gateway boulevard into the Mission Valley site, and is the subject of this RFIQ. Described in more detail in Section 103 below, the land is owned by CSU, and project development rights will be conveyed to the selected private developer(s) in the form of a fair market value ground lease, and related documents. See Section 300 Development Requirements for further details.

As envisioned in SDSU's Master Plan for the Mission Valley Site (Master Plan), SDSU seeks to transform 166 acres into a vibrant mixed-use development consisting of multiple public and private projects, including a 35,000-seat multi-use stadium (under construction), more than 80 acres of parks and open space, up to 4,600 residential units, 1.6 million square feet of office and innovation district uses, a 400-room hotel conference center, and 95,000 square feet of retail at full buildout.

The Mission Valley Site is anticipated to be subdivided into 34 public and private development parcels, of which 18 are identified for private residential uses, up to 15 for office and innovation district uses, and one for hospitality use, with neighborhood-serving retail to be distributed across uses. The Project is the first of many private development opportunities to be offered at the Mission Valley Site whereby the selected developer will enter into a long-term fair market value ground lease for individual parcels and assume responsibility for designing, constructing, financing, maintaining, and operating private development projects consistent with the use(s) envisioned in the Master Plan.

Various separate development projects at the Mission Valley Site are currently underway. Demolition, grading, utilities, and other site improvements are scheduled to be completed by fall 2022. Additional site improvements, including the River Park, are scheduled to be completed in 2023. All pro-rata costs related to any such improvements benefiting the Project will be reimbursed to the University by the selected developer as part of the fair market value ground lease consideration.

SDSU aims to establish a sustainable, walkable, and transit-oriented mixed-use development with open space and recreation areas benefiting the entire Mission Valley community, and SDSU students, faculty, residents, and businesses. The Project is specifically geared toward meeting existing and anticipated market demand for much needed market rate housing in Mission Valley, and providing a mixed-use neighborhood-serving retail anchor tenant. It is anticipated that the Project would support approximately 450 market-rate private residential units on two residential parcels and 30,000 square feet of retail space.

Joint ventures or partnerships formed for the purpose of strengthening team qualifications for the Project are acceptable and are encouraged. The developer team must include firms or individuals knowledgeable in the complexities of developing projects of this sort, with demonstrated experience in guiding projects through the approval and implementation process. Responses must also demonstrate that the team is adequately supported by highly qualified individuals or firms in an experienced development entity and in such disciplines as architecture, urban design, engineering, planning, transportation planning, construction, and legal review.

SDSU anticipates ground lease revenues from the various private developments will reimburse all public funds used for infrastructure and other public improvements benefitting each private development, and help ensure the overall long-term viability of the Mission Valley Site. As such, evidence of Respondents' ability to finance, undertake, and complete the proposed project is crucial to a successful submission.

After completion of the RFIQ phase, the proposal process will consist of a future RFP that will seek specific submissions for programming, design, financing, construction, as well as marketing, maintenance, and operation of the proposed project. SDSU will also provide additional information regarding the determination of the fair market value ground lease costs for this Project during the future RFP phase. A sample ground lease agreement will be provided at the future RFP stage. Development teams will have the opportunity to provide comments regarding the ground lease at the time of the submittal of proposals in the future RFP process. Please note that performance security requirements will be included in the sample ground lease agreement.

As a part of this RFIQ, SDSU may select developer teams to participate in an interview to discuss their qualifications, vision, and approach. The developer teams selected from the RFIQ will be invited to participate in the future RFP.

103. BACKGROUND:

On August 13, 2020, CSU purchased the Mission Valley Site from the City of San Diego. The Final Environmental Impact Report (EIR) for the Master Plan was certified in January 2020.

The following projects from the Master Plan are being executed as Public Works projects:

1. Approximately 80 acres of park and open space, including a 34- acre River Park which is located on City-owned land along the southern boundary of the Mission Valley Site. The park will include

- active and passive recreation areas.
2. A multi-purpose Stadium to accommodate 35,000 attendees and support collegiate football and bowl games, professional and collegiate soccer, concerts, and other university, community, and corporate events.
 3. Demolition of the existing stadium, grading to address 100-year flood plain requirements, and installation/relocation of site infrastructure, including roads and utilities necessary to support the stadium.

Initial construction on the above-referenced University financed projects started in August 2020. The stadium is expected to be completed in September 2022, all rough-graded individual parcels completed by fall 2022, with River Park and other related site improvements completed by 2023.

On November 18, 2020 the CSU Board of Trustees approved the concept of public private partnerships and release of Requests for Information (RFIs), Requests for Qualification (RFQs), and Request for Proposals (RFPs) for the following projects:

1. A 1.6 million gross square foot research and innovation district, consisting of up to 15 public and private projects, containing commercial, technology, and office space. These projects will allow for new partnerships between SDSU, public entities, and private companies utilizing the newly developed facilities, and will provide opportunities for student internships, create an incubator for new and innovative business and academic uses, and enhance regional economic development. It is estimated that thirteen of these projects will be located south of the new multi-purpose stadium and two of these projects will be located to the east of the new multi-purpose stadium and across the street from the Project. Approximately 5,000 garage parking spaces will serve the innovation district projects.
2. Up to 4,600 private residential units, consisting of up to 18 private projects, located on the east side of the Mission Valley Site. In accordance with the Purchase and Sale Agreement (PSA) with the City of San Diego, 10 percent of the units (or up to 460 units) will be income-qualified affordable housing leased to individuals or families at 60 percent average median income. The private residential projects at the Mission Valley Site will provide much-needed market rate and affordable housing for the larger San Diego community. SDSU's current plan is to phase up to 4,600 private housing units, including up to 460 affordable units, over the next 10 to 15 years, with current market projections showing a demand of over 500 additional private housing units per year at the Site. Each residential project will provide and maintain sufficient parking to serve the trip demand generated by that project. The current phasing plan corresponds to the delivery of two private residential pads per year and assumes sufficient housing demand to complete all private residential projects at the Mission Valley Site in less than 10 years. The private residential projects will be constructed pursuant to long-term ground leases with private developers at fair market value.
3. Up to a 400-room hotel project with approximately 40,000 square feet of conference space, up to 70 residential units above the hotel, and approximately 425 parking stalls, will be constructed pursuant to a long-term ground lease with a private developer at fair market value.
4. Up to 95,000 square feet of retail space located within the various public and private projects. These retail uses will serve stadium events, the daily needs of employees, students, and residents, in addition to the greater Mission Valley community, through various buildings, facilities, and services.

104. THE MISSION VALLEY SITE AND THE PROJECT:

A. Overview

SDSU is one of 23 campuses within the CSU system, which is governed by the CSU Board of Trustees. SDSU's existing 380-acre campus is in southwest San Diego in the City of San Diego, approximately 2.5 miles from the Mission Valley Site.

In 2020, the CSU purchased 135 acres at the Mission Valley Site from the City of San Diego. The site is in a developed area surrounded by major freeways, roadways, existing development, and the San Diego River, and is served by the Metropolitan Transit System's Stadium Station. Higher density multifamily residential land uses are located to the northwest, southwest, and east, across I-15. To the north are undeveloped hillsides and single-family residences. To the west are office and large commercial retail uses. Additional office uses and I-8 are located south of the San Diego River.

B. Overview of the Opportunity

The Project will consist of two residential parcels totaling approximately 4.24 acres and located on one full block along Innovation Parkway bounded by Jacaranda Street to the north, Coffeeberry Road to the east, Sycamore Street to the south, and Innovation Parkway to the west. This project is specifically geared toward meeting existing and anticipated market demand for housing in Mission Valley, and providing neighborhood-serving retail space with an anchor tenant, currently envisioned to include a grocery store. Aerial and parcel maps showing the Mission Valley Site are provided in Appendix 1.

The Project will be a standalone project and the timeline for its development is not dependent on the buildout or delivery of any other component of the Master Plan. It is anticipated that the Project would offer approximately 450 market-rate private residential units and 30,000 square feet of retail.

[End of Section 100]

SECTION 200: RFIQ SCHEDULE

The following represents the current schedule for the RFIQ for the Project. Although SDSU intends to adhere to this schedule, the schedule is subject to modification at any time at SDSU's sole discretion. Respondents will be notified of any changes in the schedule via email.

For avoidance of doubt, there will be no income-restricted affordable housing required to be built as part of this Project, and respondents interested in both this Project and Affordable Housing Project #1 will be required to prepare and submit separate responses to RFIQs for each project. (The RFIQ for the Affordable Housing Project #1 is anticipated to be released before the end of 2021.)

Release of RFIQ	Tue., Sept. 14, 2021
Pre-qualifications Conference (11:00 A.m.)	Thurs., Sept. 23, 2021
Deadline for Receipt of Questions (2:00 p.m.)	Wed. Sept. 29, 2021
SDSU to Respond to Question (5 p.m.)	Fri. Oct. 8, 2021
Deadline for Receipt of Information and Qualifications Packages (2:00 p.m.)	Fri., Oct. 22, 2021
Interview Date (if necessary)	November 1-5, 2021
Finalists Announcement	Fri., Nov. 19, 2021
Future RFP Released to Finalists	December 2021 (before year end)

NOTE: The RFIQ schedule of dates may be adjusted via Addendum.

[End of Section 200]

SECTION 300: PROJECT OBJECTIVES

A. Objectives for the Mission Valley Site

The following objectives have been defined for the development of the Mission Valley Site and the private residential projects:

- Provide a mix of housing options, responsive to existing and projected market demand.
- Provide retail amenities with adequate parking to serve neighborhood residents, businesses, and visitors.
- Maximize fair market value ground lease revenue to the University from P3 projects to reimburse the University for all costs and public funds associated with each private project.

B. Role of Private Developer(s)

Private sector expertise and investment will be the most effective method to implement the Project, which will provide new housing in close proximity to neighborhood-serving retail for future residents and businesses. The selected developer team(s) will envision uses for the Project that will maximize economic potential while remaining compatible with the Master Plan.

The private developer team selected from this process will undertake the following roles:

- With private sector expertise, identify the development program for the Project.
- Develop site plans, including supporting utility infrastructure, consistent with the Master Plan.
- Develop an infrastructure plan and private funding for surrounding streets, including utilities, as well as any off-site needs, all of which will be further described in future RFP documents.
- Create a financial strategy to deliver the project in the most cost-effective manner.
- Work with SDSU to finalize key financial and commercial terms for a fair market value ground lease.
- Work with SDSU to secure approval of the Project ground lease and schematic design from the CSU Board of Trustees.
- Participate in the long-term management and funding of infrastructure and amenities provided at the Mission Valley site.
- Address other requirements described in this RFIQ.

C. Role of SDSU

SDSU's primary role will be as the ground lessor. The project developer team will be solely responsible for all financing, construction, design, and operation of the project at its own cost, including all necessary grading, infrastructure, or utility work.

SDSU oversight during design and construction will be limited to coordination among individual project developers, review and approval of schematic designs (to be submitted as part of the future RFP process), issuance of building permits, and ensuring compliance with all terms and conditions set forth in the ground lease, and related documents.

Specific to the retail space within the Project, Aztec Shops, a self-sustaining non-profit SDSU auxiliary operating without subsidy or public funds from the University or the State of California, will lease back the retail space and project parking at fair market value to be specified in the future RFP from the selected developer. Aztec Shops will serve as the master leasing agent for the retail portion of the Project. This leaseback requirement does not apply to any space that is strictly accessible to residential tenants.

SDSU will take an active, ongoing role in facilitating overall long-term site management to ensure proper funding and maintenance of shared use amenities and infrastructure, such as parks and streetscapes, and compliance with all terms and conditions of the ground lease and related documents. Each developer will be responsible for paying its fair share of these costs so that all public funds related to the Project are reimbursed.

[End of Section 300]

SECTION 301: PROJECT REQUIREMENTS

The Project must advance the objectives described above in Section 300. It is anticipated that future proposals for the Project could include, but not be limited to, multifamily housing, senior housing, workforce housing, live/work units, and micro-units, or other forms of housing aligned with existing and anticipated market demand, and best suited to complement the Mission Valley Site, and parking facilities necessary to meet the demand generated by project components, recognizing the transit-oriented nature of the Site, and EIR commitments related to parking ratio maximums for residential projects. The Mission Valley Site is directly served by the San Diego Metropolitan Transit System and the Project is located less than one-half mile from the existing Stadium Station.

A. California Environmental Quality Act (CEQA) Requirements and Mitigations

The University has prepared an EIR which was certified by the CSU Board of Trustees in January 2020. The EIR examined the entire Site, including all individual projects (whether private or public). At this time, it is anticipated that no further CEQA review will be required prior to each project implementation. Each project developer will be required to conform with all environmental project design features and mitigation measures noted in the EIR, which can be found at website: missionvalley.sdsu.edu. Various mitigation measures are required, some of which will be the responsibility of the selected developer(s) to fund and implement, including but not limited to:

Air Quality, Energy, and Greenhouse Gas Emissions

- Construction Emissions Minimization
- Dust Mitigation
- Prohibition on Residential Hearths
- Electric Requirement for Building Heating and Cooling (HVAC) and Water Heating Systems
- Use of Solar Photovoltaic Panels
- EV Ready Parking/EV Charging
- Leadership in Energy and Environmental Design (LEED) Version 4 Silver or better
- Water Reclamation for Landscape Irrigation
- Adaptive Lighting Controls
- Compliance with the City of San Diego Climate Action Plan (CAP) Checklist

Hazards and Hazardous Materials

- Hazardous Materials Abatement
- Vapor Mitigation
- Emergency Response and Evacuation Planning
- Noise Mitigation
- Vibration Monitoring

Traffic and Transportation

- Construction Traffic Management
- Implementation of Relevant Transportation Demand Management Program Strategies

A summary of the Mitigation and Monitoring Reporting Program is available at website: [link](#).

B. Affordable Housing Requirements

At least ten percent of all residences constructed at the Mission Valley Site must be affordable to households earning, on average, 60% of area median income. The required affordable units must be built on-site, and a covenant requiring affordable units be income restricted for at least 55 years will be recorded against all future residential projects with affordable units. The covenant will, among other things, require regular monitoring and compliance checks to ensure that occupants always meet income eligibility requirements.

As previously noted, SDSU intends to undertake a separate future RFIQ and future RFP for a 100% affordable residential project, located on a different residential parcel and separate from this Project. Therefore, proposals for this Project should consist of 100% market-rate housing. The selected developer may however be subject to an Affordable Housing in-lieu fee for the costs of fulfilling this requirement, as set forth in the PSA and related documents. Any such fee will be further defined in the future RFP.

C. Planning and Legal Requirements

It is each developer's responsibility to comply with all applicable federal, state, and local laws and regulations, and CSU regulations and policies.

D. Application of the Public Works Law

Although the Project will be privately financed, designed, constructed, and operated wholly at the cost of the private developer, and subject to a fair market value ground lease agreement, including reimbursement to the University of all public funds associated with pre-construction project improvements and infrastructure, the Project may be subject to California's Public Work Laws (Cal. Lab. Code § 1720 *et seq.*). Prospective developers are hereby apprised of their obligation to become familiar with the requirements of the Public Works Law, including, but not limited to, those relating to paying prevailing wages, posting certain notices, and furnishing certain records to the Department of Industrial Relations on request. The University will determine whether the Public Works Law applies to the Project prior to the future RFP.

E. Seismic Safety

When a private developer constructs a building on land owned or controlled by the CSU, the Project is required to be peer reviewed in accordance with the CSU Seismic Requirements available at the following link: https://www2.calstate.edu/csu-system/doing-business-with-the-csu/capital-planning-design-construction/Documents/CSU_Seismic_Requirements.pdf.

F. LEED Certification

The Project must be constructed in a manner that meets or exceeds LEED-certified standard of Version 4 Silver in accordance with the EIR. Developers who wish to implement strategies above and beyond LEED Silver will be awarded bonus points during the future RFP stage.

G. SDSU Design Review

Schematic design will be reviewed and approved by SDSU and subsequently the CSU Board of Trustees, in accordance with the terms and conditions of the final ground lease.

H. Land Use and Permitting

University owned land is not subject to local, regional, or municipal land use regulations and functions when the University is acting in its sovereign and autonomous government capacity under Article IX of the California Constitution, as building official with full power and authority to authorize, approve, permit, and inspect the design, alteration, improvement, and construction of buildings and structures, including design review, building permit issuance, construction inspections, permit sign-off, fire and life safety inspections, final inspections, and issuance of certificate of occupancy. Issuance of building permits will be dependent upon provision of appropriate design submittals. The University complies with Title 24 California Building Standards Code, Parts 1-12 and all amendments (CBC). Compliance with other state, local and CSU codes – to the extent applicable – will be the developer’s responsibility. Accordingly, the developer will be responsible for all costs associated with meeting all applicable governmental regulations for development of the project.

I. Soils

The parcel(s) are being offered on an as-is basis. There are no known contaminated soils in the area resulting from past activities. A hazardous materials records review was conducted in 2019 as part of the Mission Valley Site purchase with documentation regarding soil conditions available at this website: [link](#).

J. Utility Infrastructure

The Project will require easements and utility connections to municipal and SDSU-owned public utility systems. SDSU expects the selected development partner to determine the most efficient approach for Project utility connections and coordinate with the appropriate entities to implement.

K. Retail Space and Dedicated Retail Parking

It will be the developer’s responsibility to complete core and shell construction on the ground floor retail space, provide a specified number of on-site parking stalls for dedicated retail use (in a separate area from the residential parking), and comply with Mechanical, Electrical, Plumbing (MEP) and other technical specifications provided by Aztec Shops, a self-sustaining non-profit SDSU auxiliary that operates without subsidy from the University or the State of California. Aztec Shops intends to master lease the retail space and dedicated retail parking stalls from the selected development partner and assume responsibility for the cost of tenant improvements and leasing commissions. Upon delivery of the retail space, Aztec Shops will pay the selected development partner a market value lease rate sufficient to repay development costs and an appropriate return on cost for both the retail space and dedicated retail parking stalls. The lease rate and terms of the lease will be further defined as part of the future RFP process.

L. Residential Parking

The EIR imposes a maximum parking supply of 1.23 spaces per dwelling unit. The parking supply provided at individual residential developments, including the Project, may be able to exceed this ratio, provided that an average of 1.23 spaces per dwelling unit is not exceeded across all completed residential developments.

[End of Section 300]

SECTION 400: RFIQ SUBMISSION REQUIREMENTS

All Statements of Qualification (SOQs) shall include information in the format described below and shall be **limited to 25 pages** (excluding the table of contents, forms and information requested in Item F below) with a minimum font size of 11 points including graphics. Page numbers should be included on all pages that count toward the 25-page limit, and should not appear on pages that do not count toward the 25-page limit. Please submit information in appropriate detail on each of the items described below to allow adequate review and evaluation. The format for the submission of information consists of the following elements:

- A. Cover letter (not to exceed 3 pages)
- B. Table of Contents
- C. Identification of Developer and Team Members
- D. Development Team Qualifications
- E. Development Vision
- F. Financial Capability

The development team is completely responsible for ensuring the SOQ is submitted properly and received by SDSU. SOQs submitted by mail will not be accepted. The SOQs will remain confidential until the evaluation and selection process is complete. Following selection of finalists, all SOQs will become a matter of public record. Respondents may request truly confidential or legally proprietary information be redacted from any response to a public records request, if any, and SDSU will honor such requests to the extent allowed under the California Public Records Act.

The following information shall be provided in the Statement of Qualifications:

A. Cover Letter

The cover letter should include the full title of the RFIQ, submittal date, principal contact, address, telephone number, email address, and brief narrative outlining proposer's interest, capabilities, and relevant project experiences. Development team shall provide a letter signed by a principal or officer authorized to represent and commit on behalf of the firm(s). The letter must acknowledge that the Project will be subject to a non-subordinated long-term ground lease without option to purchase.

B. Table of Contents

A Table of Contents shall be included.

C. Identification of Developer and Team

Each development team must complete **Form 1** summarizing the principal parties¹ and key contacts. In the Description Box on **Form 1**, indicate any relationship the principal party may have with a parent corporation, subsidiaries, joint ventures or other entities. If a joint venture is

¹ Principal parties include the developer(s) and any guarantor(s) to the developer(s), if applicable.

proposed, percentage of ownership of each entity should be specified. In addition, identify all key project team members including resumes of assigned personnel, describing relevant project experience and specific required technical skills in **Form 2**.

D. Developer Team Qualifications

Of particular interest is the development team's track record of assembling and managing a team capable of fulfilling the requirements of the Project (e.g., architects, landscape architects, urban designers, planners, artists, engineers, builders, property managers, etc.). Preference will be given to a development team with a track record on projects of similar complexity and scale to the proposed Project demonstrated by submitting:

1. **Narrative:** Provide a narrative describing the projects referenced in Form 3 in further detail including key results and successes, design work done for the project [with preference for projects requiring input from a design review board], property management structure and strategy utilized [with preference for management experience in which the scope of responsibilities included coordination with third parties on the maintenance of shared infrastructure and amenities], equity participation and funding structure used (including how long initial equity investment was held) as well as photos of the project. To the extent any subcontractors have been identified and are anticipated to be part of the team (e.g., property manager, architects, etc.) please identify them.
2. **Form 3:** Identify no fewer than three similar development projects in terms of scale and placemaking (ideal project size of 200 to 1,000+ units) that have been completed in the last seven years. It is preferred that at least one of these projects used a long-term ground lease structure. Project experience in San Diego, in the state of California and/or a CSU or UC campus is preferred.
3. **Form 4:** Reference information for each of the development projects listed in Form 3.

E. Project Vision

Provide a narrative description of the development team's vision for the Project and its relationship to the objectives described above. The vision for this site should include:

1. Brief narrative outlining the development approach including market assumptions and assessment underpinning the proposed structure, knowledge of environmental review, building code and permitting processes, phasing schedule and construction timeframes.
2. A concept for the Project identifying proposed type of housing units and residential parking, to be constructed, phasing strategy (if applicable), and describing how the proposed concept is responsive to existing and anticipated market conditions in Mission Valley.
3. Statement indicating how developer proposes to finance the development of the Project, showing the proposed source and the amount of equity investment, including how long the initial equity investment is anticipated to be held, and the proposed source of financing.
4. The development concept should also include a description of how the proposed Project will integrate with the Master Plan and adjacent stadium and innovation district uses.

F. Financial Capability

As noted above, for each of the principal parties comprising the proposed development team, please provide:

1. Three years of audited financial statements for each of the principal parties and a list and the status of any and all pending litigation against the principal parties, their subsidiaries, or affiliates. SDSU reserves the right to inspect the books and records of each prospective developer.
2. Copies of any financial rating reports or other documents indicating the financial condition of the principal parties of the development team. Prior to final selection of development team, SDSU will require a credit report or authorization from each of the principal parties of the development team for SDSU to request such a report at the development team's expense.
3. A statement indicating whether a voluntary or involuntary petition under federal bankruptcy law has ever been filed with respect to the principal parties of the development team within the past ten years. If so, state the date, case number, court jurisdiction and amount of liabilities and assets.
4. Provide a brief narrative describing the development team's approach to capital raising (for prior projects) including lenders and equity sources used for long-term ground lease structured projects.

[End of Section 400]

SECTION 500: RESPONSE REQUIREMENTS

Firms responding to this RFIQ must submit a complete original submittal on or before the date and time set forth herein. The submittal must be organized and formatted in accordance with the requirements outlined in Section 400. Firms shall respond by electronic file upload only. **SUBMISSIONS WILL NOT BE ACCEPTED IF SUBMITTED THROUGH ANY OTHER MEANS** (the University will not accept submissions via mail, personal delivery, or courier service). Mistakes or delays in the electronic submission of documents are entirely the responsibility of the Firm. **LATE RESPONSES WILL NOT BE ACCEPTED.**

Statement of Qualifications:

The RFIQ qualifications response document shall be submitted as two electronic files in .pdf format as follows:

1. The first file shall contain the information requested in Items A through E as outlined in Section 400 and shall be marked as “Statement of Qualifications Submittal.”
2. The second file shall contain the information requested in Item F as outlined in Section 400 and shall be marked “Development Team Financial Capability.”

Both files shall also include a title page (exempt from the page limit requirement) with the following:

- The Name of Firm and Address
- Attn: Gina Jacobs, Associate Vice President, SDSU Mission Valley
- RFIQ for Mission Valley Residential and Retail Project #1
- The RFIQ Due Date and Time

Pages may be scanned, or converted to .pdf from other file formats. Searchable formats are preferred.

All forms requiring a signature shall be signed by an authorized officer or employee of the Firm. The name, title, mailing address, email address, and phone number of the authorized officer or employee shall be included. Electronic signatures are acceptable.

[End of Section 500]

SECTION 600: EVALUATION CRITERIA AND PROCESS

RFIQ PROCESS OVERVIEW

The purpose of this RFIQ is for development teams to demonstrate, in a concise manner, their ability to finance, develop, maintain and operate the Project. SDSU may modify this RFIQ, any of its key actions dates or any of its riders, prior to the date fixed for submission of SOQs by issuance of an addendum.

If any ambiguity, conflict, discrepancy, omission, or other error in the SOQ or any of its supporting documents becomes evident, please immediately notify the University contact of such error in writing and request clarification of the document. Modifications, if needed, will be made by addendum.

Costs for responding to this RFIQ are entirely the responsibility of development teams and shall not be chargeable to SDSU.

While it is the intent of SDSU to proceed with this RFIQ, this RFIQ does not obligate SDSU to enter into a contract or other agreement. SDSU reserves the right to cancel this RFIQ at any time, if it is in the best interest of SDSU. No obligation either expressed or implied exists on the part of SDSU to make an award or to pay any costs incurred in the preparation or submission of SOQs. Further, the University reserves the right to waive any minor irregularities it feels are immaterial to this RFIQ. The decision of the University is final.

SOQs become the property of SDSU. Information submitted in the SOQ becomes public property and may be subject to public records disclosure laws. SDSU reserves the right to make use of information or ideas contained in submittals. A digital copy of each SOQ will be retained in SDSU official files.

An evaluation team comprised of University personnel, and, appropriate external entities, as determined by the University, will review each SOQ submitted in response to this RFIQ to ascertain relative strengths and weaknesses based on the submission requirements described herein. SDSU may seek additional information from development teams and may also wish to conduct interviews and/or site visits as part of the selection process. Selection will be based on the completeness and quality of responses to the initial RFIQ, and subsequent presentations, particularly with respect to the criteria identified below.

Qualifications will be evaluated based on the following criteria:

1. Responsiveness of Development Vision (15%)

The quality of the development team's concept including whether market demand and conditions justify the concept and the way the proposed project meets the goals and objectives described in the Project Objectives and the Project Requirements sections of the RFIQ. The extent to which the Project Vision articulates an approach to obtaining construction and permanent financing for the proposed project (particularly on leased land), knowledge to complete necessary critical path milestones, and the phasing schedule (if necessary) and soundness of the Project and construction time frames. Architectural plans and renderings are not required in the submittal.

2. Development Team Qualifications (35%)

Demonstrated record of experience of the development team in completing relevant projects similar in size, type, and magnitude to the proposed project concept, including past performance in meeting project schedules, successful prior collaboration experience in public-private partnerships, successful incorporation of public spaces and/or mixed-use development, multi-building/multi-phase buildout, which meet LEED or comparable environmental standards. The quality of references for team members will be considered.

3. Financial Capacity (50%)

Demonstrated financial capacity to undertake the Project and provide any necessary/ guarantees to successfully complete the project via financial statements provided for developer entity or entities, and any guarantors. Sufficiency and readiness of sources to invest debt and equity necessary for the project based on financial statements. In addition, ability to demonstrate experience and sound process in raising financing for similar projects.

[End of Section 600]

COMPANY INFORMATION			
Company Name		<input type="checkbox"/> Individual <input type="checkbox"/> Company <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Joint Venture <input type="checkbox"/> Other: _____	
Description of any relationship(s)			
Street Address		City	State Zip
Federal ID # or Social Security Number		Date of Corporation	
Name of State(s) in which incorporated		Guarantor (if applicable)	
FOR PARTNERSHIP ONLY			
DATE OF ORGANIZATION		Is the partnership: <input type="checkbox"/> General <input type="checkbox"/> Limited <input type="checkbox"/> Association	
Name addresses zip of all partners		Use additional sheet if necessary	
Certified Small Business <input type="checkbox"/> Yes <input type="checkbox"/> No OSDS No.	SB Cert Expire Date:	Certified Disabled Veteran Business Enterprise <input type="checkbox"/> Yes <input type="checkbox"/> No OSDS No.	DVBE Cert Expire Date:

Key Contact Information	
Name	Title
Phone No. () -	Fax No. () -
Mobile No. () -	Email Address

General Information	
No. of Years in Business	No of years in providing this product
Include a description of the full range of products offered	Primary markets served
Growth strategy for next five years	Attach a list with explanation of defaulted, completed and current contracts similar in nature to the proposed services required in this RFQ.
If you have done business under different name, please give name and location	Has firm ever been engaged in litigation over any contract, If so, explain.



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EXPERTISE OF PERSONNEL

Attach additional sheets if necessary.

(All information must be related to this RFIQ)

Educational and Training Background,
Employees to be assigned to THE PROJECT

Number of Years' Experience

1. _____
Name

Title

2. _____
Name

Title

3. _____
Name

Title

4. _____
Name

Title

5. _____
Name

Title

Developer Experience

COMPANY NAME (1)	PROJECT NAME AND LOCATION (2)	PROJECT DESCRIPTION (3)	PROJECT COST (4)	START/END DATES

INSTRUCTIONS:

- (1) A minimum of three projects must be included with a preference for at least one of them to have used a ground lease structure.
- (2) Only list similar development projects in scale and placemaking, with an ideal project size of 200 to 1,000 + units, on which the lead developer worked within the past seven years.
- (3) Project description must also include the type of project and client, size, summary of programmatic components, and contract structure.
- (4) Show company’s participation in terms of money and percentage of the construction work for the listed project.



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REFERENCES

Provide a list of references which demonstrate experience in developing a project similar in nature required by this RFIQ. Include company/institution name and address, and name, title, and telephone number of person to contact. **Attach additional sheets if necessary.**

Company Name

Street Address

City

State

Zip

Telephone Number

Fax Number

Person Familiar with Performance

Title

Number of years' project performed

Date of last project performed

Description of Project:

Company Name

Street Address

City

State

Zip

Telephone Number

Fax Number

Person Familiar with Performance

Title

Number of years' project performed

Date of last project performed

Description of Project:

Company Name

Street Address

City

State

Zip

Telephone Number

Fax Number

Person Familiar with Performance

Title

Number of years' project performed

Date of last project performed

Description of Project:



Mission Valley

QUALIFICATION CERTIFICATION FORM

NOTE: THIS PAGE MUST BE COMPLETED, SIGNED, AND RETURNED WITH YOUR SUBMITTAL

The undersigned certifies that to the best of his/her knowledge: (check one)

() There is no officer or employee of San Diego State University who has, or whose relative has, a substantial interest in any existing or future agreement subsequent to this Request for Information and Qualification.

() The names of any and all public officers or employees of San Diego State University who have, or whose relative has, a substantial interest in any existing or future agreement subsequent to this Request for Information and Qualification are identified by name as part of this submittal.

In compliance with this RFIQ for the Mission Valley Residential and Retail Project #1 and after carefully reviewing all the conditions imposed therein, the undersigned agrees to furnish information in accordance with the specifications and scope of the Project according to this submittal or as mutually agreed upon by subsequent negotiation, after a future RFP.

CERTIFICATION	
Signature	Typed Name and Title
Name of Company as Licensed	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership
Federal and State Tax ID Numbers	
Street Address	City State Zip
Phone No. () -	Fax No. () -
Mobile No. () -	Email Address