

**City and County of San Francisco
Planning Department**

CW20-01

**Amended Request for Proposals for
Professional Services for
ADU Incentives Program – Pilot Assessment Phase
(DEADLINE EXTENDED)**



**SAN FRANCISCO
PLANNING
DEPARTMENT**

Date issued:	1/9/2020
Proposals due:	2/4/2020 at 2:00 p.m.
Email proposal to:	james.glik@sfgov.org
For questions contact:	james.glik@sfgov.org

Scope for San Francisco's ADU Incentives Program – Pilot Assessment Phase

Project Description

The San Francisco Planning Department is seeking to hire an organization to design and carry out a Pilot Assessment Phase of a future ADU Incentives Program. The Pilot Assessment Phase would take place in San Francisco Supervisorial District 4, which has been identified as a suitable location due to high rates of senior and low-income homeowner residents. During the Pilot Assessment Phase, the selected organization would design a process for identifying qualified homeowner applicants and assessing their properties for ADU potential. The Pilot Assessment Phase would end in a report summarizing findings from the properties surveyed, including opportunities and challenges to constructing ADUs in different types of buildings, and offering data and recommendations on how to design an ADU Incentives Program, which would incentivize the construction of affordable ADU units throughout San Francisco.

Background and Context

San Francisco's successful ADU program, established in 2014, has received applications for almost 1,700 new housing units within existing buildings. The City has committed to making ADUs a viable option by allowing more flexibility in the program, streamlining approval processes, and providing promotional and educational workshops.

Homeowners still face multiple barriers to construction, including lack of access to technical assistance, financing, and assistance with ongoing property management. In many cases, homeowners are reluctant to take even the initial step of hiring an architect to assess the feasibility of building an ADU on their property due to cost, uncertainty and risk, and lack of information. In particular, single-family, senior, and low-income homeowners without access to capital - including many households of color and people with disabilities – may be unwilling or unable to take this initial step.

The tasks outlined in this scope of work aim to offer single family homeowners with low to moderate incomes pre-design technical assistance. Through the Pilot Assessment Phase, qualified applicants will receive an assessment of the feasibility of adding an ADU in their homes. At the end of the program, qualified applicants will receive a feasibility report, including a rough estimate of the difficulty and cost of adding an ADU to their property. Another desired result of the Pilot Assessment Phase will be a pre-pipeline of households ready to participate in future phases of the ADU Incentives Program. The organization hired will also complete a report summarizing key findings learned during the Pilot Assessment Phase, which the Department will consider when designing future phases of the pilot ADU Incentive Program.

Future phases of the ADU Incentives Program (not included in this scope of work) will aim to:

- Create deed-restricted units at lower per-unit costs compared to new construction of 100% affordable housing projects, with an emphasis on keeping units affordable
- Provide financial and housing stability for homeowners who add ADUs
- Allow seniors in to age in place by creating more accessible units or space for live-in care takers
- Improve accessibility to ADUs for physically impaired individuals

Required Tasks and Deliverables

Task 1 - Establish Detailed Scope of Work

Working with the San Francisco Planning Department, the Office of the District 4 Supervisor, and other involved City agencies, finalize details of the scope of work including tasks, schedule and specific milestones and program deliverables.

Deliverable:

- *A finalized scope of work*

Task 2 - Design parameters of the Pilot Assessment Phase

Design the parameters, procedures and components of the Pilot Assessment Phase. Examples of components include but are not limited to:

- i) Homeowner pilot program application and approval process, including homeowner and building eligibility
- ii) Process and suite of tools for assessing applicants' properties for ADU feasibility
- iii) Standardized feasibility report format and criteria for assessing feasibility

Deliverable:

- *A prototype for the Pilot Assessment Phase*

Task 3 - Design educational and promotional materials and create an outreach and engagement plan

Develop educational and promotional materials and a plan for outreaching to potential applicants.

Deliverables:

- *Handouts and pamphlets to publicize the program and describe its components*
- *A plan for reaching potential applicants, including in-person events and online outreach*

Task 4 - Carry out Pilot Assessment Phase

Using procedures identified in Task 2, call for applications and select qualifying applicants. Then, using process and tools identified in Task 2, assess applicant properties for ADU potential.

Deliverables:

- *Assessment of properties of qualified applicants for ADU feasibility*
- *List of potential applicants for future phases of the ADU Incentives Program*
- *Staff and carry out outreach activities detailed in Task 3*

Task 5 - Analysis and Reporting

Analyze data gathered in assessment of properties and produce a report summarizing findings. This report will guide the design and implementation of a full scale ADU Incentives Program, which will be developed in future phases of work.

Deliverable:

- *An assessment of all properties surveyed, including details about factors that would influence the feasibility of building ADUs in each*

- *A report evaluating the Pilot Assessment Phase and describing lessons learned which would help shape future phases of the ADU Incentives Program*
- *Challenges and opportunities to consider in the design of a future ADU Incentives Program*

Eligibility Criteria

1. The applicant must be a City-approved supplier before the contract is awarded. If the applicant is not currently a City-approved supplier, it must begin the certification process as soon as possible and be City-approved before being awarded the contract. Please refer to: <https://sfcitypartner.sfgov.org/pages/become-a-supplier.aspx>

Minimum Qualifications

The applicant must demonstrate the following qualifications and expertise, or propose to partner with another organization which has the following qualifications and expertise:

1. Experience working with single-family homeowners, in particular the following:
 - a. Low-income homeowners
 - b. Senior homeowners
2. Experience in implementing or applying for existing city programs (San Francisco-specific experience not required)
3. Chinese (Mandarin and Cantonese) language speaking staff

Selection Criteria

The applicant must demonstrate the following qualifications and expertise, or propose to partner with another organization which has the following qualifications and expertise:

Proposals will be reviewed and scored on a 100 point evaluation scale as follows:

Performance Measurement, Financial Management and Budget (20 points)

1. A detailed narrative budget justification presenting reasonable costs in view of activities proposed and expected results
2. Applicant demonstrates adequate fiscal controls to ensure prudent use, proper and timely disbursement and accurate accounting of funds awarded
3. Description of how the applicant would address how data on project activities, outputs and outcomes will be collected and reported

Project Approach (50 points)

4. A narrative description of how the applicant would approach the project, including how the proposed work will address the needs of various stakeholder groups, including but not limited to marginalized and/or historically underrepresented groups, families with children, seniors, disabled individuals and limited- or non-English speaking members of the community.
5. A detailed scope of work, including tasks, deliverables and budget

Applicant Qualifications and Neighborhood Connections (30 points)

6. Description of applicant's experience working with single-family homeowners, including specific experience with low-income and senior homeowners
7. Description of applicant's experience performing outreach to communities of color, disabled individuals, and monolingual communities
- 8.
9. Description of experience in implementing or applying for existing city programs
10. Description of the applicant's Chinese (Mandarin and Cantonese) language skills