



Santa Clara County Planning Collaborative RFP for Inclusionary and Commercial Linkage Fee Studies

Issued: November 3, 2023

Due: December 5, 2023, 5 pm

Question and Answer Session (Zoom): December 14, 2023, 10:30-11:30 am

Project Background:

Several cities in Santa Clara are interested in creating or updating their inclusionary requirements and commercial (affordable housing) linkage fees. For some, these requirements may be new, and others are ready for an updated feasibility study. A few jurisdictions are interested in a nexus study for impact fees that would apply to small projects (fewer than 10 units).

The below table summarizes the anticipated needs of the participating jurisdictions:

| | Residential Nexus Study (Projects <10 units) | Residential Feasibility Study | Commercial Nexus Study | Commercial Feasibility Study |
|--------------------------------|---|----------------------------------|---------------------------|---------------------------------|
| Gilroy | | | X | X |
| Los Altos Hills | X | X | | |
| Los Gatos | | X | X | X |
| Mountain View | | | X | X |
| Santa Clara (city) | X | X | X | X |
| Saratoga | X | X | | |
| Sunnyvale | | X | | |
| TOTAL JURISDICTIONS | 3 | 5 | 4 | 4 |

These jurisdictions have indicated strong interest, but they will make their final commitments after proposals have been received, so please include language on how your pricing would adjust accordingly.

This project is being coordinated by the Santa Clara County Planning Collaborative (SCCPC), a multicounty housing collaborative staffed by Community Planning Collaborative (CPC), formerly known as Baird + Driskell Community Planning. We have considerable experience coordinating projects like this and strong working relationships with all the cities. CPC will contract separately with the Cities Association of Santa Clara County (SCCPC's fiscal sponsor) or jurisdictions for its project coordination scope. Under this separate contract CPC may provide additional analysis to help guide jurisdictions' decision-making in setting their requirements.

On a general level, CPC will convene cities, ensure jurisdiction data is provided and provide a single point of contact, with authority to make decisions when appropriate.



Project Deliverables

We welcome suggestions on how to improve this scope of work.

The proposed deliverables (and to be finalized early in the scoping process) would include:

RESIDENTIAL NEXUS STUDY

Individual nexus studies for each interested jurisdiction. It is understood that the different city reports will be similar, only edited as needed. Appendices can be the same for all reports.

- One prototype to be studied (single-family/small multifamily with less than 10 units)

RESIDENTIAL FEASIBILITY STUDIES

Semi-customized, feasibility report for each jurisdiction. It is understood that the different city reports will be similar, only edited as needed. Appendices can be the same for all reports.

- Simple sensitivity analysis for feasibility
 - Comparing how changes in rent would affect feasibility (e.g., a statement that an X% increase in rent would balance out the new requirements if construction cost stayed the same)
- We propose that jurisdictions may choose up to 5 of several standardized prototypes, to be finalized with the selected consultant. This may range from single-family (ownership) to attached townhomes (ownership) to low-, mid- and high-rise multifamily (rental or ownership options TBD).
- Limited affordability/income level alternatives (e.g., studying no more than 4 AMI categories)
- Some data must be customized for each city (land prices, rents, fees)
- Include cost of affordability requirements as a percent of total development cost
- Customized inclusionary requirement recommendations based on each jurisdiction's goals and needs, etc.
 - It is not expected that the consultant will conduct a full analysis of the inclusionary program recommending large scale changes or improvements. Rather, you should understand a limited number of parameters (e.g., if the jurisdiction wants fees or units) and make recommendations about set aside levels (e.g., 10% of units), affordability levels (e.g. 70% of AMI) and impact fee levels.
 - CPC will provide additional support under separate contract with the jurisdictions to refine requirements.
 - **OPTIONAL TASK:** Recommend corresponding in-lieu fee levels for jurisdictions who choose this option.



COMMERCIAL NEXUS AND FEASIBILITY STUDIES

Conduct a commercial nexus and feasibility study with individual reports for each jurisdiction

- 5 prototypes
 - Office
 - Industrial
 - Life science/R&D
 - Retail
 - Hotel
- Appendices can be the same for all reports
- Customized requirement fee-level recommendations based on each jurisdiction's goals and needs, etc.
 - Will not ask for fine-grained recommendations from consultant. CPC will provide additional support under separate contract with the jurisdictions to refine requirements.

Proposed Process

Below is a suggested process. We welcome suggestions on improvements in your proposal.

After conducting an initial group meeting and completing research, the consultant will deliver a sample report for one city. CPC (on behalf of the Planning Collaborative) will collect and consolidate comments from all six jurisdictions on that one report. The consultant will then produce a final version of the reports for each jurisdiction.

1. Group Kick-off Meeting (logistics and scheduling for all meetings handled by CPC) (Can be in-person or virtual)
2. 1:1 Meeting with each jurisdiction (and CPC) to understand jurisdiction-specific goals and needs (Can be virtual). CPC can schedule.
3. Research and data gathering - Consultant will conduct all necessary research to make educated requirement/fee recommendations. CPC is available to assist in collection of all needed data from cities if helpful.
 - Developer stakeholder meeting – Consultant will organize and facilitate. Meeting should include developers of rental and ownership housing.
 - Meeting with housing advocates and the public – Consultant will organize and facilitate
4. Prepare draft suite of reports – Prepare draft reports summarizing methodology, findings and recommendations for one city. This will serve as a model for cities to provide comments before the consultant produces the remaining reports. After receiving comments on one model report, prepare draft reports including recommendations for all cities.
5. Group Meeting to discuss results – Present draft report and recommendations meeting.
6. 1:1 meeting with each jurisdiction to present jurisdiction-specific recommendations.
7. Revise as necessary and complete final reports.



Logistics

- CPC will coordinate all logistics including arranging meetings and phone calls if desired.
- CPC will also supply requirements/fee levels from surrounding jurisdictions.
- Cities will be responsible for supplying necessary background information as identified by consultant (e.g., recent commercial developments, fees, etc.)
- The chosen consultant will sign a contract with the Cities Association of Santa Clara County.
- CPC will have authority to sign off on all products and will be the sole point of contact to direct the Cities Association/fiscal sponsor to release payment.

OPTIONAL TASKS

- Please include the cost to attend public hearings (on a cost per hearing basis).
- Please include a cost for additional 1:1 meetings at a jurisdiction's request

To Apply

Please send a short scope of work, budget and timeline, qualifications and 3 references to Shali Sirkay at the Cities Association (shali@citiesassociation.org) with a copy to Kristy Wang at Community Planning Collaborative (wang@planningcollaborative.com) by 5 pm on December 5, 2023. It is not necessary to graphically design your proposal. A concise Word document is fine.

Please direct questions to Kristy Wang at the above address or 415.425.8460.

APPLICATION

We recommend the following sections:

1. **Cover letter:** Please include a cover letter with a brief introduction, a summary of the general approach to the scope of work, any suggested modifications to the scope of work, and any other information that you would like to highlight.
2. **Qualifications and Relevant Experience:** Describe your firm's experience and qualifications. Include a list of some jurisdictions for which you have provided similar services. Provide the web address to representative ordinances or policies.
3. **Key Personnel:** Describe your team's capacity for providing these services, including the approximate number of supporting staff. Provide a resume for the project manager, main point of contact, and other key staff who will be involved in the project.
4. **Approach/Scope:** Describe the approach and methodology your firm will use to complete the above deliverables and confirm your proposed process. Feel free to suggest alternatives and improvements to the process described above.



- **REQUIRED:** Please describe how your team will address the challenge of assessing feasibility at this volatile time in the market. Since jurisdictions will want to set requirements that will function effectively over the next several years, please describe your approach to adjusting for changing market conditions.
 - Proposals must meet the requirements of AB 1505 (2017) and Government Code Section 65850.01.
- 5. Budget:** Submit a summary and breakdown of costs associated with the scope of work, including
- Not-to-exceed amount (exclusive of optional services)
 - Cost breakdown for each task
 - Estimates of personnel time allotted for each task
 - Hourly rates for staff
 - 10% contingency
 - Costs for any optional tasks or additional services offered or recommended
- 6. Schedule:** Include a timeline for project deliverables. The project schedule should include the proposed work plan, the step-by-step breakdown of the tasks to be carried out, and the proposed timeframe in which specific tasks and major milestones will be completed. **Please reference the above Proposed Process milestones and deliverables in your schedule.**
- 7. References:** Include the name, address, phone number, and email for three (3) references for which you performed similar work.

Please break down the pricing so that jurisdictions can understand their share of the cost and potentially opt out.

SELECTION CRITERIA

We intend to use the following selection criteria:

1. Experience and qualifications
2. Approach/Methodology
3. Cost
4. Timeline

Note there is some flexibility, but some jurisdictions would like the studies to be completed in mid-2024. We are hoping this is a ~9 month project, shorter if possible.

| ACTION | TARGET DATE |
|---|--|
| RFP distributed | Friday, November 3, 2023 |
| Optional Q&A for interested consultants | Tuesday, November 14, 2023, 10:30 am |
| Deadline to respond | Tuesday, December 5, 2023, 5 pm |
| Virtual interviews (if needed) | Weeks of December 11/18 |
| Preliminary selection | Week of December 18 |
| Negotiate and sign contract | January 2024 |
| Begin work | January 2024 |



An optional Q&A session for interested consultants will be held on Zoom at 10:30 am on Tuesday, November 14 at

<https://us06web.zoom.us/j/5128092635?pwd=VUNneUtlRm5adHI2RGowbTNITFI5Zz09>.

There may be interviews or consultant may be hired based on application alone. Consultant selection will be made jointly by the participating jurisdictions.

Additional Provisions

Prospective consultants shall not contact jurisdiction officers or employees with questions or suggestions regarding this solicitation except through the primary contact person listed above. Any unauthorized contact may be considered undue pressure and cause for disqualification of the consultant.

The client reserves the right to reject any and all proposals submitted. The client also reserves the right to waive or not waive any informalities or irregularities in proposal responses.

The client reserves the right to cancel award of this contract at any time before execution of the contract by both parties if cancellation is deemed to be in the client's best interest. In no event shall the client have any liability for the cancellation of award.

Proposals must remain valid for at least 90 days. Proposals must be signed by a representative authorized to bind the consultant.

All proposals submitted are the property of the client and are public records. All documents received by the client are subject to public disclosure after the client selects a consultant.

The client is not liable for any cost incurred by consultants prior to execution of a contract.