



**REQUEST FOR PROPOSALS TO PREPARE CONCEPTUAL DESIGNS, FINAL DESIGNS, AND CONSTRUCTION DRAWINGS FOR HEART'S GREEN AND LIVABLE ACCESSORY DWELLING UNIT RESOURCE PROGRAM**

**Proposal Due Date: 3:00 p.m., Friday, June 14, 2019**

The Housing Endowment and Regional Trust of San Mateo County (HEART) is seeking proposals from qualified architects and designers interested in contracting with HEART to prepare one or more set of plans for the development of accessory dwelling units as part of HEART's Green and Livable Accessory Dwelling Unit Resource Program (GLADUR).

- HEART will work with the selected architect(s) to develop a standard set of plans for four alternative designs for accessory dwelling units (ADUs).
- The goal of this project is to make it easier and less expensive for homeowners to plan, design, obtain permits, and ultimately build a green ADU on their property. By providing four (4) ADU prototype designs and construction drawings, the program will save the homeowner the cost of preparing plans and construction drawings, which they can reinvest in energy-saving features, space-saving amenities and green building materials. In addition, HEART will work with the selected architects and local jurisdictions in San Mateo County to pre-review the designs, which would reduce uncertainty with regard to the approval of the designs.
- The four design prototypes should consist of the following:
  1. Each design should provide a different secondary unit type: a ~ 400 SF studio, a ≤ 640 SF 1-bedroom unit with a square footprint, a ≤ 640 SF 1-bedroom unit with a rectangular footprint, and a 2-bedroom unit between 750 and 1,000 SF.
  2. All units should be designed as "green" projects that far exceed existing energy code requirements by integrating energy and water conservation measures, renewable energy systems and sustainable materials as key design considerations. GLADUR units will not include any features that burn wood, propane or natural gas. Exhibit "A" contains a list of design elements that could be considered in the designs to improve energy efficiency and livability.
  3. All designs should provide for affordable finishes.
  4. Each design should allow for the installation of a variety of exterior architectural treatments (e.g., board and batten, clapboard, shingle, stucco) and roofing materials (e.g., asphalt shingles, tile, etc.) that maximize compatibility with existing architectural styles in San Mateo County.
  5. Each design should be adaptable to allow for the reflection of multiple common architectural building vernacular commonly found in San Mateo County (e.g. Bungalow/Craftsman, Spanish revival, Post-war Suburban/Ranch, European Colonial, and more modern architectures).



Spanish Revival



Bungalow/Craftsman



Post-war Suburban



European Colonial

- HEART is also developing a short companion “Green ADU Handbook” that provides information about how to make ADUs greener. Many of the features in Exhibit A will be discussed in the Handbook and reference GLADUR designs that feature them.

San Mateo County’s Home for All and 21 Elements have developed the Second Unit Resource Center complete with a workbook and idea book that can be viewed on their website at: <https://secondunitcentersmc.org/>.

The model ADU plans should include:

- Floor plans that allow flexibility on orientation/entrance options (e.g., mirrored);
- Elevations that illustrate a design that is compatible with typical San Mateo County residential architecture and neighborhoods;
- Engineer’s calculation and stamp for a flat site with no drainage, soil, or slope issues;
- Construction drawings including a framing plan and roof options (i.e., materials and styles);
- Schedules (including for energy-saving appliances, lighting, water-conserving plumbing fixtures); and
- List of materials (including estimated quantities).

Firms should also provide a sample Title 24 Energy Report (using conservative assumptions) to facilitate the quantification of greenhouse gas emissions for their design(s). The baseline unit could be located on a generic, flat lot with no adjacent trees/vegetation and a solar orientation that provides the least energy-saving advantages.

HEART encourages proposers to adapt previously developed designs provided that they meet local and state building codes, sizing requirements, and reflect livability and green design elements.

HEART also encourages the submittal of pre-fabricated, container and other unique options for consideration provided they are adaptable to meet the requirements of multiple jurisdictions and meet the energy efficiency goals described in this request for proposals.

Firms will be required to meet the standards for the following four jurisdictions to the extent feasible: Belmont; Daly City; Redwood City; and South San Francisco.

HEART will submit the ADU designs to the four cities listed above for review. The selected firm(s) will answer questions from city staff, support HEART at meetings with city staff, and make modifications as requested by the cities. HEART will act as the primary point of contact between city staff and the firm(s).

In addition, firms may be requested to revise the designs to meet the building/design standards for other jurisdictions in San Mateo County on a case-by-case basis. **The cost for supporting HEART with plan submittals to additional cities and any revisions to the plans for these cities is not included in the scope of work, and should not be part of the bid budget and costs.** However, it is highly recommended that firms submit a separate time and materials cost schedule for meetings and for revising the plans for a city requiring revisions.

Funding for the project is provided by the Bay Area Air Quality Management District. The selected architecture firm(s) can choose to perform additional work related to designs for homeowners, at homeowners’ expense, on such items as site plans for their particular property or on modifications to the plans. If the original pre-reviewed plans are modified for a homeowner, the architectural firm(s) must agree to make it clear to the cities upon submittal that the plans have been modified and are subject to a full review by the city. Architects are advised to discourage modifying the designs to include the use of natural gas, fireplaces or any other combustion sources that worsen air quality and directly produce greenhouse gases.

Other information or addendums necessary to supplement this RFP will be posted on HEART’s ADU webpage: <https://www.heartofsmc.org/programs/accessory-dwelling-units/> on May 24 and June 7, 2019.

## SCOPE OF WORK

### This contract would consist of the following tasks:

1. Initial meeting with HEART staff to discuss the GLADUR Program, the scope of work, review and revise timelines, and identify all work products to be prepared and completed by architect/designer.
2. Prepare conceptual second unit designs including: floor plan(s), elevations. HEART is proposing the development of four (4) different ADU designs:
  - a. ~ 400 square foot studio;
  - b. ≤ 640 square foot, 1-bedroom unit with a rectangular footprint;
  - c. ≤ 640 square foot, 1-bedroom unit with a square footprint; and
  - d. 2-bedroom unit between 750 and 1,000 SF

All four designs would be designed as decarbonized—meaning home appliances would not be powered by fossil fuels or wood. They would also include other green building measures including energy conservation, water conservation, and sustainable materials. All four designs would aim to provide affordable finishes that are as environmentally friendly as possible. All designs should include a variety of exterior architectural treatments and would complement San Mateo County's architectural vernacular. All designs and construction drawings would become the property of HEART to be made available to the public for their free use.

3. Attend two (2) public open house-style meeting and one (1) GLADUR Steering Committee meeting to present the conceptual design(s) and receive feedback and direction regarding the design.
4. Prepare final designs. Revise conceptual design as necessary based on feedback and direction.
5. Attend one (1) public open house-style meeting and one (1) GLADUR Steering Committee meeting to present the final design(s).
6. Upon approval of final design, prepare complete construction drawings (including 3D rendering), relevant specifications for each unit including finished materials, schedules, energy report, specifications and an engineer's stamp for the design on a generic lot without slope, soil, or drainage issues.
7. Submittal of Conceptual Design, Final Design, and Complete Construction Drawings. Proposals should include the costs for transmitting ten (10) sets of the conceptual design, ten (10) sets of the final design, and ten (10) sets each of the complete construction drawings and specifications for the affordable and moderate unit design.
8. Submittal of an electronic copy of the final design, including PDF files and CAD construction drawings and related materials.
9. Work with HEART to submit plans and obtain pre-review approval from building officials at up to four cities.

### PROPOSAL SUBMITTAL REQUIREMENTS

1. Proposers should send a USB drive containing the relevant proposal files as well as five (5) copies of the completed proposals and cost bid so that it is received by HEART no later than **3:00 p.m. on Friday, June 14, 2019** to:

HEART of San Mateo County  
Attention: Boris Vatin, Management Analyst  
2905 S. El Camino Real  
San Mateo, CA 94403

2. Format: Proposal should be 8½ x 11 inches, printed two-sided on recycled paper with removable bindings, bound in a single document and organized in sections following the order specified under contents.
3. Contents: Proposal shall contain the following information below.

A. Firm Description & Relevant Experience

Provide a brief description of your firm and any relevant experience designing ADUs, green building and/or experience working for public agencies. Provide one example of your work that has the most relevance to the ADU design(s) on which you are proposing.

C. Key Personnel Qualifications

Identify key personnel who will work on the project and a summary of relevant experience. Include any certifications related to green building, energy certification and design. An architect licensed by the State of California is mandatory for each proposal. Identifying the engineer who will be certifying the designs is highly recommended.

D. References

List three clients for whom similar work (e.g., ADUs, “green” homes, tiny homes, etc.) has been performed, with name, title, and phone number of a contact person. HEART may request any copy of similar projects prepared previously by the firm.

E. Scope of Work

Provide an explanation of tasks associated with the project, including any changes to the scope of work that HEART has illustrated above.

F. Budget and Schedule of Charges

Provide a “Not to Exceed” budget broken down into the following categories:

- Two meetings with HEART Staff and/or the GLADUR Steering Committee;
- Development of conceptual design(s);
- Preparation of final designs, construction drawings, materials list, specifications;
- Provision of Engineer’s Stamp;
- Two public meetings to discuss draft plans that will be scheduled for the same week and one public meeting to present the final plans;
- A list of other costs, including: equipment, printing, travel costs.

Each architectural/design firm is invited to propose for the design of one, two, three or all four second unit designs. HEART sees an advantage of using different architects for each project, in that each design will have a unique vision. Likewise, HEART sees an advantage for all four designs to be completed by one architect, namely ease of coordination and reduced costs. Feel free to submit a proposal for one to four designs. Proposals that include multiple variations (e.g., architectural style, roofing options, heights, etc.) for each of the core designs are highly encouraged. However, please provide a breakdown of cost for just one design, as well as an indication of cost savings if you are proposing on more than one design in your budget description.

G. Work Schedule

Provide a brief time schedule in terms of months for the completion of work based on the Scope of Work noted above. HEART anticipates a four- to eight-month time horizon for completion of the work depending on the architect(s) schedule.

H. Insurance

The individual or firm receiving the contract shall procure and maintain for the duration of the contract, insurance against claims for injuries to persons or damages to property that may arise from or in connection with the performance of the work hereunder by the Consultant, his agents, representatives, employees, or subcontracts as set forth in Section 11 of Exhibit “B” which is

attached hereto and incorporated by reference herein. The cost of such insurance shall be included in the consultant's proposal.

I. Consultant Agreement

HEART's standard consultant services agreement is attached as Exhibit "B". Please identify if your firm would have any issues with the provisions of HEART's standard consulting services agreement.

**EVALUATION CRITERIA**

Proposals will be evaluated on the basis of the following criteria (100 total points maximum):

- Qualifications and experience of key individuals (45 points).
- Capabilities and resources of the firm (15 points).
- Cost (30 points).
- Schedule for completion of work (10 points).

The above selection criteria are provided to assist proposers and are not meant to limit other considerations that may become apparent during the course of the selection process.

**TEAM INTERVIEW**

Proposals will be reviewed and evaluated by HEART staff and the top four candidates will be invited for a short interview with staff. The Interview will take place in early July 2019.

The selected architect(s) will be recommended for award of contract and presented to the HEART Board of Directors on July 24, 2019.

**OTHER CONSIDERATIONS**

HEART of San Mateo County reserves the right to reject any and all proposals. This Request for Proposals does not commit HEART to award a contract, pay any costs incurred in the preparation of proposals, or to procure or contract for supplies or services.

HEART of San Mateo County reserves the right to negotiate with any qualified source or to cancel, in part of or in its entirety, this Request for Proposals, if it is in the best interest of HEART to do so. HEART may require the selected consultant to participate in negotiations, and submit such price, technical, or other revisions of the proposal that may result from negotiations.

**QUESTIONS**

Questions should be directed to:

Boris Vatin, Management Analyst  
Housing Endowment and Regional Trust of San Mateo County  
(650) 204-5639  
E-mail: [bvatin@heartofsmc.org](mailto:bvatin@heartofsmc.org)

Any information resulting from questions that may be of benefit to all bidders, or addendums to this RFP, will be posted on HEART's ADU webpage: <https://www.heartofsmc.org/programs/accessory-dwelling-units/> on May 24 and June 7, 2019.

**ATTACHMENTS**

Exhibit "A" – Recommended Design Elements

Exhibit "B" – HEART's Standard Professional Services Agreement