

REQUEST FOR PROPOSALS
Designer for Off the Shelf Master Plan Set for
Cottages and Accessory Dwelling Units

-- CITY OF MERCED --

February 14, 2022



REQUEST FOR PROPOSALS - OUTLINE

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I. PROJECT OVERVIEW

The City of Merced requests proposals from qualified residential design firms to prepare a Master Plan Set for a new Off the Shelf Cottage & Accessory Dwelling Unit (ADU) Program. The goal is to make it easier for homeowners to add on to their property using preapproved design plans for cottages and ADUs thus increasing the inventory of affordable housing options. **Key statements in this RFP are shaded red. For a general overview, please review those sections.**



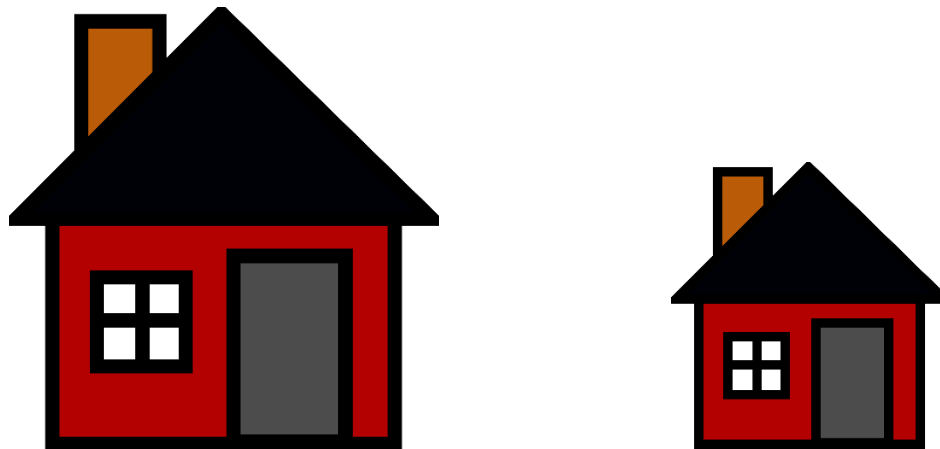
Goal: The goal of this new program is to encourage the construction of cottages and ADUs by offering a selection of pre-approved Master Plans that can be used free-of-charge. This project aims to assist with infill development of more affordable housing stock. Lack of affordable and plentiful housing options in the City of Merced makes this design project a priority for the City.

This effort should include the following:

- Designed full plans that would be treated as Master Plans so that anyone can choose a plan set, pay their permits and build.
- Preparation of multiple options for small cottages or ADU's. Options should start with three size ranges

Unit Type	Approximate Square Feet
Studio	Less than 500 SF
1 bed/1bath	600 - 700 SF
2 bed/1bath or 1 bed/1bath	1000 - 1200 SF

- Each of the plans must have an ADA compliant design and a standard design.
- Each size cottage should have at least three different architectural styles to best integrate into the neighborhood design style: for example, Craftsman or Bungalow, Spanish and Mid Century/Modern/Contemporary.
- Building plans should include a deferred submittal: Fire sprinkler master plans are required and shall be submitted and installed by a CA licensed Fire Sprinkler Contractor (C16). ADU's are only required to have fire sprinklers as described in the "CAL FIRE – Office of the State Fire Marshal Information Bulletin 21-005", or as amended. (Attachment A)
- All designs shall fully comply with the current California Codes, California Code of Regulations, Title 24, Parts 1, 2, 2.5, 3, 4, 5, 6, 8, 9, 10, 11 and 12.
- Drafting and finalizing a Cottage & ADU Program reproduceable handout and visual guide to assist potential applicants. This handout will also be published on the City website.
- Upon completion of the design work, present the Master Plans in a reproduceable Design Model Workbook with the various models and the architectural floor plans



Funding: The City of Merced is funding this effort through a Planning Grants Program Application (SB2) from the State of California Department of Housing and Community Development.

Timeline: The *Project Timeline* sought by the City for this project is approximately 6 months from start to finish for design plans and deliverables.



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**PROPOSALS ARE DUE AT 5:00 P.M.
ON FRIDAY, MARCH 11, 2022**

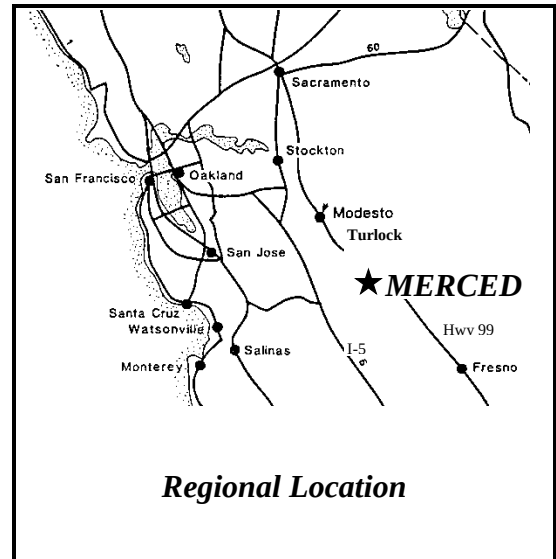
II. BACKGROUND INFORMATION / PROJECT DESCRIPTION

A. City of Merced

Located in the heart of the San Joaquin Valley, the City of Merced is the Merced County seat as well as the retail commercial center for the surrounding region. Known as the “Gateway to Yosemite” because of its historic and current status as a stopping place for visitors on their way to Yosemite, Merced is just 80 miles from the national park. Merced is also home to the University of California, Merced campus, which opened in 2005 and has a student population of over 9,000 in 2020 and is expected to have 10,000 by the end of the year.

Merced is approximately 150 miles southeast of San Francisco and is one of a chain of cities located along State Highway 99. Highway 99 is one of the two main north-south arteries connecting Southern California to the Pacific Northwest region. The City of Modesto is located 40 miles, Stockton 65 miles, and Sacramento 100 miles to the north of Merced along Highway 99. The City of Fresno is 55 miles and Bakersfield is 165 miles to the south along Highway 99.

Merced City Limits are generally bounded on the west by State Highway 59 and Thornton Road, on the east by McKee and Tower Roads, on the north by Old Lake Road, and on the south by Dickenson Ferry Road/Mission Avenue. In 2021, the City of Merced covered approximately 23.1 square miles (or approximately 14,800 acres) and had a population of approximately 90,000.



B. City of Merced Recently Revised ADU Ordinance

As of January 2020, several amendments to California law regarding the creation of ADUs became effective. The amendments were born through 2019 SB13, and 2019 ABs 68, 587, 670, 671, and 881. To comply with state law, the City of Merced amended the Accessory Dwelling Units section of the Merced Municipal Code 20.42, on March 15, 2021 (Attachment B). Standards were established for development of ADU's and JADU's. The current ADU ordinance can be found here:

https://library.municode.com/ca/merced/codes/code_of_ordinances?nodeId=TIT20ZO_PT3GERE_CH20.42ACDWUN

To further streamline the production of cottages and ADUs, the City applied for and received the SB 2 grant. The project related to this RFP was "Off the Shelf Plans for Cottage or ADU." Per the SB 2 Planning Grant Application:

“-these are predesigned full plans that would be treated as Master Plans so anyone can choose a plan set and pay a fee along with the permit fee to build the unit. They could be an ADU or a stand-alone home on a lot- Cottage. We anticipate having 3 size ranges: less than 500 sf - exempt from school fees, 600 to 700 sf, 1,000 to 1,200 sf. Each of the three plans would have an ADA compliant design and a standard design. Also, we would have three different elevation styles to allow for better integration in the community - Craftsman or Bungalow, Spanish, and Mid Century/Modern/Contemporary. The plans would have fire sprinkler master plans prepared. A stand alone or cottage unit will be required to have fire sprinklers. An ADA unit only is required to have sprinklers if the primary unit does. This would require a contract with a designer. Estimated cost is \$85,000 and would include plan checking costs.”

III. PROJECT DETAILS AND SCOPE OF WORK

The Project timeline and budget is set by terms of the agreement between the City and the consultants. These factors and other structural topics are described here.

A. Project Approach

The City seeks assistance from consultants with specialized skills to prepare design plans for cottages and ADU's. The design plans will be used for an off the shelf design plans program to encourage construction to increase the inventory of affordable housing options.

B. Environmental Review

Initiating and authorizing the request for proposals for ADU centered work associated with the receipt of SB 2 grant funds is not subject to the California Environmental Quality Act pursuant to Public Resources Code Section 21065 and CEQA Guidelines Section 15060(c)(3), because this activity does not constitute a “project” pursuant to CEQA Guidelines Section 15061(b)(3) as it can be seen with certainty that this activity will not have a significant effect or physical change to the environment. Furthermore, individual planning projects occurring from the grant funds and ADU program will be evaluated for CEQA compliance on a case-by-case basis. Lastly, CEQA does not apply to regional housing needs determinations made by the Department of Housing and Community Development, a council of governments, or a city or county pursuant to Section 65584 of the Government Code.

C. Project Schedule/Timeline for Milestones & Deliverables

The *Project Timeline* sought by the City for this project is approximately 6 months, starting with the contract award in May 2022. The consultant is welcome to recommend adjustments to the timeline, where appropriate. The project should be accomplished in phases. Designs shall be to

current CA Codes in effect at time of Building Permit Application for permit. Phase 1 completed at two months into the project, with 35% completed designs. Phase II completed by four months with another 35% of designs due. Phase III will end at six months, with all designs and deliverables complete. All designs must pass design review and plans checked. Plans shall be given to the City in a professionally designed catalog of options that can be reproduced and shared with the public. Plans should also be in electronic format for download.

Phase	Time	% Completion
I	2 Months	35%
II	4 Months	35%
III	6 Months	100%

D. Scope of Work

The following services (listed under A-D) will be the responsibility of the Consultant. Consultants are also encouraged to present suggested modifications to the scope in their proposals that most effectively meets the goals and objectives described in this RFP, however the City seeks to achieve the full scope within the budgeted amount. The scope of work includes, but may not be limited to the following tasks:

A. Project Management

- a. Project Kick-Off Meeting: Meet with staff project team to identify project milestones, refine the scope of work, confirm timeline, clarify specific roles and responsibilities and identify project resources.
- b. Management Tools: Identify tools and methods that will be used to keep the project moving on time and within budget. Consultant should anticipate meetings with the staff project team throughout the project, including regular conference calls and in person or virtual group meetings at key milestones.

B. Meetings

- a. Plan for at least two Design Review Meetings: meetings to include a preliminary review of the models and a final review and approval of models following any changes requested and made.
- b. Draft review of the Cottage & ADU Program reproduceable handout and Design Model Workbook
- c. The City expects that most meetings can be held virtually via Teams or Zoom.

C. Design Work

- a. Develop three sizes of permit ready cottages or as ADU's

Unit Type	Approximate Square Feet
Studio	Less than 500 SF
1 bed/1bath	600 - 700 SF
2 bed/1bath or 1 bed/1bath	1000 - 1200 SF

- b. Designs should meet the style options as outlined in the grant project proposal.
- c. Designs must meet the requirements of the City's ADU ordinance
- d. Building plans should include a deferred submittal: Fire sprinkler master plans are required and shall be submitted and installed by a CA licensed Fire Sprinkler Contractor (C16). ADU's are only required to have fire sprinklers as described in the "CAL FIRE – Office of the State Fire Marshal Information Bulletin 21-005", or as amended.
- e. Designs should have accessibility options for those with mobility impairments
- f. LEED certified or similar environmental rating if possible, consultant to provide input on measures to reduce the carbon emission, water usage, and energy use.
- g. All plans shall be submitted to the City's Inspection Services Division for plan review. The Consultant shall be responsible for the Plan Review Fee of the Master Plans. Additional information on the submittal process is available - <https://www.cityofmerced.org/departments/development-services/building-division/downloads/-folder-1130>, additional information is also Attachment D – City of Merced Master Plan Requirements. For Electronic Plan Review - [Electronic Plan Review | Merced, CA \(cityofmerced.org\)](https://www.cityofmerced.org/departments/development-services/building-division/downloads/-folder-1130)

D. Visual presentation of program deliverables

- a. Create a Cottage & ADU Program reproduceable handout and visual guide to assist potential applicants. This handout will also be published on the City website.
- b. Upon completion of the design work, present the Master Plans in a reproduceable Design Model Workbook with the various models and the architectural floor plans.
- c. Produce downloadable construction level Master Plan sets of building plans for each building size. Architectural styles and interior floor plans can be mixed and matched for the different building sizes.



E. Budget

The Project is being funded by the SB 2 Grant awarded to the City of Merced in 2019. This project has a grant budget not to exceed \$85,000, including master plan review costs. All invoices against the grant are due to the City no later than June 2023.

IV. REQUESTED CONSULTANT SERVICES

A. Preferred Consultants

The City does not have a preferred consultant for this project. The City reserves the right to select either a team, managed by a lead consultant, or to select individual consultants to provide the City with the different deliverables of the Project. The desired situation will be the former, however. Proposals must present a team approach and include all deliverables in the proposal. Attachment C lists all consultants that were sent this RFP. Issue-specific consultants must partner with other consultants on this list, or other firms not listed. If the later, then please receive City approval of the “general consultant” prior to submitting your proposal.

B. Milestones/Key Deliverables

See the Scope of Work with Project milestones. 35% of project shall be completed at 2 months, 35% more at 4 months, and project fully delivered at 6 months.

C. Roles

City staff will coordinate with the consultant on all work products.

D. Expertise

This RFP was provided to consulting firms with specific skills to accomplish one or more deliverables. The most competitive consultant will be made up of a multi-disciplinary team whose goal is to prepare a comprehensive Master Design Plan set that meet the criteria set forth by the City.

E. Required Meetings

- a. Project Kick-off Meeting

- b. Monthly check in Meetings via Zoom
- c. Design Review

V. CONSULTANT SCOPE OF SERVICES

The consultant's proposal should include all of the following topics in the order presented. All topics will be used to assess the consultant's: 1) project understanding; 2) project interest; and, 3) competency. All proposals shall be submitted in writing and be signed by the consultant.

A. Deliverables and Budget

Deliverables / Consultant Scope-of-Work

This RFP requests a Comprehensive Project Work Plan or Timeline for the entirety of the Project from the consultant, which should include at the very least, all the tasks in the draft scope of work. Each deliverable should be described separately in terms of work, budget and time.

While an ideal candidate will show strength in all deliverables, City Staff may need to elect to form a multi-disciplinary team of separate consultants in order to produce the best end-product, but this is not our preferred approach.

Budget

The following shall be included in describing the budget allocation in the Consultant Proposal:

- Person hours allocated to each step and total hours allocated for project objectives and overall project (including sub-contractors), or flat costs by tasks with a "not to exceed" figure for each task;
- A breakdown of the employees and professionals to be assigned to each project objective and the hourly rates and person-hour costs assigned (please indicate total number of hours for each project team member along with total hours for each project objective and the entire project), or flat costs by tasks with a "not to exceed" figure for each task;
- Personnel charge rates of the firm;



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- Classification as to whether or not employees are reimbursed by hourly rate or salary; and,
- List of any subcontractors who may provide technical or other assistance and breakdown of hours/costs associated with the sub-consultants.

The proposal shall describe the compensation to perform the services outlined herein, and such discussion needs to be consistent with the established budget. Any exceptions to the budget, timeline, and/or requirements stated herein shall be clearly stated in the proposal, and fully explained.

B. Past Projects of Similar Nature

Evidence of past work experience closely related to the preparation of design plans for cottages and ADUs. This section should describe why the consultant is a good fit with this Project. Please provide previous relevant experience and references of other public projects for both the project team and consulting firm.

C. Who is on the Project Team?

Describe the members of the project team, along with their roles and duties. Describe past work associations with team members.

D. Team Member Resumes

Include team member resumes with the proposal, which describe their qualifications to prepare the requested deliverables.

E. Other

The Scope of Work shall discuss other topics, either individually or as part of the above sub-sections, including:

- The administrative aspects of the project (legal oversight, printing costs, etc.);
- The type of word processing equipment and software used; and,
- Any optional features/analysis proposed.

VI. RFP LOGISTICS AND PROCESSES

A. Project Manager / City Contact

Leah Brown, Management Analyst, is the City of Merced Project Manager and will represent the City of Merced and render overall supervision of the progress of the work. All services to be performed by the consultant will be subject to approval and acceptance by the Project Manager or his/her designee, and no payment will be made to the consultant until accepted and approved. Leah may be reached at: Phone: (209) 385-6928 and Email: brownl@cityofmerced.org

The City's Project Manager will work cooperatively with the consultant(s), by: 1) providing the consultant with whatever information is available regarding its requirements for the project; 2) examining project-related documents submitted by the consultant and rendering decisions promptly to avoid unreasonable delay in the progress of the consultant's work; and, 3) furnishing information required of it as expeditiously as necessary for the orderly progress of work.

B. RFP Due Date / Mailing Address

Please send **five (5)** copies of the proposal to:

Leah Brown, Management Analyst
City of Merced Development Services
678 West 18th Street
Merced, CA 95340

To be accepted, the Project Manager must have them in-hand, NOT postmarked, by **5:00 p.m. on Friday, March 11, 2022.**

C. Pre-Proposal/Scoping Meeting

There will not be a pre-proposal or scoping meeting for this project. Please submit any questions in writing to the Project Manager prior to 5:00 p.m. on Friday, February 25, 2022. City staff will attempt to answer all questions and email them to all proposers by Tuesday, March 1, 2022.

D. Selecting Interview Pool

Proposals submitted will be reviewed for completeness and qualifications by the City of Merced. Approximately three (3) consulting firms will be invited to interview with City staff. The interview date is **tentatively** scheduled for **Tuesday, March 29, 2022.**

E. Interview Format

The Project Manager will arrange the interviews. The interview room sits eight people and includes a projection screen. The room *does not* include a projector or laptop. A PowerPoint presentation is not required or expected. The purpose of the interview is not to restate the consultant's proposal, but rather to discuss the project with the consultant team members who will actually prepare the deliverables. Failure to include these individuals in the interview is grounds for automatic disqualification.

F. Final Selection Process

Upon conclusion of the interviews, the interview team will discuss the strengths and weaknesses of the proposals and make a decision as to which team, or independent consultants, will be recommended for final approval by the Merced City Council. The City staff will work with the selected consultant(s) to prepare a professional service contract, and to prepare and present the City Council administrative report to the Merced City Council. It is anticipated that formal consultant selection and contract award will be approved by the City Council in May 2022.

G. Review and Selection Schedule

Review and Selection Schedule		
Action	Date	Other
Pre-Proposal Questions Submitted by Proposers	Friday, February 25, 2022	Received in writing by 5:00 P.M.
Answers to Questions Emailed to All Proposers	Tuesday, March 1, 2022	By 5:00 P.M.
Proposal Due Date	Friday, March 11, 2022	Received by 5:00 P.M.
Consultant Interviews	Tuesday, March 29, 2022	Block out entire Day.
City Council Contract Approval	Monday, May 2, 2022 or May 16, 2022	6:00 P.M. (attendance not required)

VII. CONTRACTUAL TOPICS

Labor Code

The consultant shall comply with Sections 3700 et seq. of the labor code of the State of California, requiring every employer to be insured against liability for worker's compensation.

Insurance

The Consultant shall also provide liability insurance in the amount of \$1,000,000 naming the City as additional insured. Please carefully note the endorsement and cancellation causes in the required contract. Please refer to the sample contract (Attachment C)

Conflicts of Interest

The Consultant must be aware of and comply with conflict of interest rules included in the California Political Reform Act, and Section 1090 et. Seq. of the Government Code. The Political Reform Act requires City offices and committee members to file statements of interest and abide by a Conflict of Interest Code. Section 1090 limits or prohibits a public official from contracting with a body of which an official is a member. Section 1090 applies even where the officer only reviews the contract for the approving body. If the proposer holds no City committee appointment or other relationship, the proposal should simply state that in response to this item.

Form of Contract

The City's standard form of contract shall be used, and includes other provisions not described here. A standard professional service contract is attached for reference (Attachment C). Please review this very carefully and note in the body of your proposal any exceptions or alterations to the agreement. Alterations or changes to the agreement which were not in the consultant's response will not be made after City Staff selection of the consultant. This includes alterations, exceptions, or changes to the insurance and indemnity provisions. By requiring these requests up front, the City can compare all respondents on an equal footing.

Local Business Enterprise Policy (LBE)

The City of Merced is committed to ensuring a full and equitable participation by local businesses in the provision of all goods and services to the City.

Method of Compensation

The City of Merced reserves the right to award all or part of the project at its discretion. The City of Merced will compensate the consultant(s) based on the submittal of monthly invoices and monthly progress reports. The City reserves the right to request more detailed information from the consultant on its monthly invoices if needed.

Conditions for Responses to Request for Proposals

The following conditions apply to this RFP process:

- Nothing contained in this RFP shall create any contractual relationship between the respondent and the City.

- This RFP does not obligate the City to establish a list of service providers qualified as prime contractors, or award a contract to any respondent. The City reserves the right to amend or cancel this RFP without prior notice, at any time, at its sole discretion.
 - The City shall not be liable for any expenses incurred by any organization in connection with this RFP.
 - No conversations or agreements with any officer, agent, or employee of the City shall affect or modify any terms of this RFP. Oral communications or any written/e-mail materials provided by any person other than designated contact staff of City shall not be considered binding.
 - The City reserves the right, in its sole discretion, to accept or reject any or all Proposals without prior notice and to waive any minor irregularities or defects in a Proposal. The City reserves the right to seek clarification on a Proposal with any source.
 - The dates, times, and sequence of events related to this RFP shall ultimately be determined by the City. The RFP process schedule is subject to change, at the sole discretion of the City, although the City will attempt to follow it and, if it must be altered, will attempt to provide reasonable notice of the changes.
 - Respondents shall not issue any news release pertaining to this RFP, or the City without prior written approval of the City.
 - All submitted proposals and information included therein or attached thereto shall become public record upon delivery to the Planning Division.
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Attachments

- A) CAL FIRE – Office of the State Fire Marshal Information Bulletin 21-005
- B) City of Merced Ordinance #20.42 - Accessory Dwelling Units
- C) Sample Professional Services Contract
- D) City of Merced Master Plan Requirements