**Template Scope of Work for Planning Collaborative Consultant RFP**

***Note:*** This document provides a summary of collaboration opportunities that ABAG has included in the Framework for the use of its Regional Early Action Planning (REAP) grant. ABAG has currently budgeted $500K in existing REAP funds to support RHNA Subregions and Planning Collaboratives. Proposals regarding potential levels of financial support for each Subregion and Collaborative are expected to be discussed at ABAG’s Housing Committee meeting in October 2020 and decisions are expected to be made by the ABAG Executive Board in November 2020, though timing may change. This document also provides a sample scope of work that counties can use to hire a consultant to staff their collaborative if they would like to get started in advance. However, if counties plan to rely on anticipated REAP funds for this work, ***they are encouraged to state in RFPs that a contract will only be signed if money is available.***

**A COLLABORATIVE APPROACH TO ADDRESSING OUR HOUSING CHALLANGES**

**The Bay Area’s Housing Challenge:**

The Bay Area’s housing challenges are enormous. For decades we have produced dramatically more jobs than housing, but this growth has been uneven with some areas not benefiting. Rent and sale prices continue to increase, displacing residents, creating inequality, and forcing longer and longer commutes. Wildfires have destroyed thousands of homes, and other environmental and economic threats loom on the horizon, which could further lead to housing displacement in communities large and small.

Against this backdrop, the housing planning and approval rules that local jurisdictions are required to follow are overwhelming, and beyond the capacity of most jurisdictions without specialists. The upcoming round of Housing Elements will be the most difficult and expensive to complete, ever. No jurisdiction can single-handedly tackle the housing challenges we face as a region.

**Our Regional Response:**

Bay Area communities can better address these economic, environmental, and regulatory challenges by working together to craft analyses, policies, and joint solutions for making the Bay Area a more livable and equitable region, community by community. Our regional approach is designed to reduce costs for all jurisdictions by achieving economies of scale, avoiding unnecessary duplication of effort, and widely sharing learnings and innovations.

That is why ABAG is launching a collaborative approach to addressing our regional housing challenges. With funding from REAP, to complement Local Early Action Planning (LEAP) grants and SB2 Local Planning Grants, ABAG will support groups of local jurisdictions as they work together to address their housing priorities. There will be technical assistance, trainings, and logistical support for forming and sustaining collaborative networks.

Collaboration will take several forms including:

* **Geographic collaboratives** – (Mostly) county-based groups staffed by a paid coordinator that provides technical assistance and facilitates cross-jurisdiction engagement for the Housing Element updates and other housing-related topics. These groups will meet regularly, at least monthly, and jurisdictions will be able to call on their coordinator for additional help. It is anticipated that ABAG will provide REAP funding to Counties (or to their designees) to independently contract with paid coordinators to ensure that they address locally set priorities. Counties can use their own procurement systems to select a coordinator, or may choose to select a coordinator through a Regional Consulting Bench that ABAG expects to have in place in early 2021. REAP-funded coordinators must participate in shared learning opportunities to be organized by ABAG and share work product produced.
* **Peer cohorts** – Learning communities of jurisdictions facing similar challenges (e.g., large cities, under-resourced cities, rural communities, etc.). These learning cohorts will meet occasionally (e.g., quarterly) to discuss housing topics of shared concern. These will likely be staffed and funded at the regional level by ABAG.
* **Topic-specific work groups** – Short-term, issue-specific trainings and work sessions for jurisdictions adopting similar legislation or working on similar projects. For example, there may be groups formed to tackle local implementation of new ADU laws or one with jurisdictions that are focused on advancing equity. These will likely be staffed and funded at the regional level by ABAG.

**What Are the Benefits of Participating?**

The goals of this effort are 1) to save jurisdictions time and money, and 2) improve housing policy and outcomes. Jurisdictions will define the focus, products, and services that they need most to collectively address their local housing priorities. This can take many forms, such as writing sample staff reports, creating presentation slide decks, providing FAQs, hosting workshops, and conducting trainings. It will be flexible and responsive based on jurisdiction needs. Specific benefits include:

* **A Dedicated Technical Assistance Provider and Useful Products** – A staff person will work with each collaborative to provide technical assistance and connect them to resources as needed to help jurisdictions adopt their Housing Elements or implement other housing laws. *Potential* products/activities include:
  + Understanding Housing Element law – Training for staff on Housing Elements and a dedicated person to answer questions. Material for staff to present to their boards and councils.
  + Material for Housing Elements – Conducting analyses to help jurisdictions get their Housing Elements certified. For example, detailing safe assumptions for the sites inventory and writing countywide summaries when necessary (e.g., comparing constraints of various neighbors). Housing needs data packages from ABAG will also be distributed through the collaboratives.
  + Targeted expertise – Helping connect jurisdictions with specialists and resources needed to understand and respond to specific housing issues and opportunities.
  + New housing laws – Training, summary material, staff reports and presentation slide decks summarizing new housing laws. This includes implementing the Affirmatively Furthering Fair Housing requirements.
  + Outreach – Developing outreach material and conducting outreach activities with the public and decisionmakers to raise awareness about Housing Elements and build support for pro-housing policies and programs.
* **Peer Learning** – Through the peer cohorts, jurisdictions will have the opportunity to work with and learn from their colleagues from similar jurisdictions.
* **Special Projects** – If multiple jurisdictions are interested in similar projects, the coordinator can help make things happen.

**What Are the Responsibilities of Participating Jurisdictions?**

The main responsibility of jurisdictions will be to participate in regular meetings and share data, learnings and work products that could benefit others in the region. They will also be responsible for hiring and supervising the collaborative coordinator. It is expected that the majority, if not all, of the costs of the Collaboratives, Cohorts and Work Groups will be funded by REAP through the end of 2023, however this is subject to approval by ABAG’s Executive Board.

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**HIRING A COORDINATOR FOR YOUR COUNTY HOUSING COLLABORATIVE:  
SAMPLE SCOPE OF WORK AND BACKGROUND**

***Note:*** *This sample Scope of Work is being provided to assist local jurisdictions in complying with REAP funding guidelines when hiring consultants. County (or cross-county) groupings of jurisdictions are free to edit the following scope of work to meet their needs, but are encouraged to discuss changes with ABAG to ensure compliance with grant requirements. While counties may benefit from releasing RFPs soon to expedite the hiring process, please be advised that ABAG has not made any final decisions on funding.* ***Counties are encouraged to state in RFPs that a contract will only be signed if money is available if counties plan to rely on REAP funds for this purpose.***

**Regional Early Action Planning (REAP) Grants Background**

ABAG will use a portion of its State-allocated REAP funding to support county-based housing collaboratives. ABAG has currently budgeted $500K in existing REAP funds to support RHNA Subregions and Planning Collaboratives. Potential levels of financial support for each Subregion and Collaborative will be discussed at ABAG’s Housing Committee meeting in October and decisions are expected to be made by the ABAG Executive Board in November. It is likely that significant additional REAP funding will be budgeted beyond the initial $500k to support Collaboratives. ABAG’s program design calls for the Collaboratives to be complemented by other activities, including:

* Peer based cohorts – Groups of similar cities that cross county boundaries (e.g., the three largest cities or rural communities)
* Work groups – Short-term groups of cities working on similar challenges (e.g., ADU updates)
* Consulting bench – Prescreened list of consultants
* Timely products – Specific products developed for the region to help cities update their housing elements (e.g., summary of housing needs and sites inventory tool)
* Outreach and messaging – Regional work to build support for housing

**Collaboratives Background**

The county-based collaboratives will be the primary method for ABAG to deliver technical assistance to local jurisdictions as they update their Housing Elements.

The collaboratives will each be staffed by a paid coordinator that helps organize the group, facilitate their interaction, and provide technical assistance to jurisdictions as they update their Housing Elements and address other housing-related topics. These groups will meet regularly, at least monthly, and jurisdictions will be able to call on their coordinator for additional help.

REAP-funded Coordinators/collaborators are required to freely share the products they develop with other Bay Area counties. REAP-funded Coordinators are required to attend regular meetings (no more frequently than monthly) facilitated by ABAG to assist in program design and to share lessons learned, best practices and work product across the Bay Area.

**Scope of Work: Collaborative Coordinator and Technical Assistance Provider**

* Maintain contact information and a list serve of staff working on Housing Elements and housing projects to be shared with ABAG;
* Provide trainings to jurisdictions about housing elements and other housing-related topics;
* Be a liaison between HCD, ABAG and the jurisdictions, ensuring that staff know about state and regional resources;
* Maintain a website so jurisdictions can easily access technical assistance;
* Host and facilitate regular meetings with jurisdictions;
* Tailor material developed by ABAG to be more reflective of the unique circumstances in the county;
* Conduct countywide surveys/summaries, with a focus on information that is needed for the Housing Element (e.g., fee levels for the constraints section). Additional summaries could include policies and programs of different jurisdictions;
* Participate in regular meetings with coordinators from other counties and share material and learnings freely with this group and with ABAG;
* Develop additional products to help jurisdictions complete their housing elements (e.g., summary of best practices, summary of typical non-governmental constraints; guidance memos, etc.)
* Answer jurisdiction questions or help with requests as they arise, as time permits;
* Assist with countywide/multi-jurisdiction outreach;
* Update Planning and Community Development Directors, housing staff and other stakeholders;
* Assist jurisdictions in updating decision makers (e.g. planning commission and city council) by producing sample staff reports/slide decks, and conducting presentations.

**Hours and Budget**

The exact budget will not be known until the ABAG Executive Board acts in November. As a placeholder, RFP respondents are encouraged to use 20 hours per week as a temporary figure.