



**RETHINK HOUSING**  
Housing opportunity for all

# REQUEST FOR PLANNING CONSULTANT Housing Development Incentives Program Rethink Housing Action Plan Implementation Consultant Services

**Notice is hereby given that Requests for Planning Consultants will be received by the City of Everett to assist the city in reviewing and updating its housing development incentives program.**

## Project Overview

Everett adopted the [Rethink Housing Action Plan](#) on October 7, 2021. The Plan contains a set of recommended actions to encourage the construction of additional affordable and market-rate housing in a greater variety of housing types and at prices that are accessible to a greater variety of incomes. Short Term Strategy 5 identifies actions related to incentives that could increase housing production efficiently and effectively that meet the needs of people of all incomes. The project addressed under this request for proposals will include a review, analysis, preparation, and update of new and current housing production incentives.

## Selection Schedule

RFP Publication: April 18, 2022  
Submittal Due: May 13, 2022, **no later than 3:00 PM Pacific Time.**  
**No submittals can be accepted after that date and time.**

Attn: Rebecca McCrary, Long Range Planning Manager  
Email: [ramccrary@everettwa.gov](mailto:ramccrary@everettwa.gov)  
City of Everett-Planning Division  
2930 Wetmore Ave. Ste 8A  
Everett, WA 98201

Submittal Review: May 16-20, 2022  
Interviews: May 23-26, 2022  
Selection: June 1, 2022  
Contract Award: June 15, 2022  
Notice to Proceed: June 15, 2022

## City Contact

Any questions or clarifications regarding the project, solicitation, and submittals should be directed to Rebecca McCrary at the e-mail listed above.

 2930 Wetmore Ave., Ste. 8-A  
Everett, WA 98201

 425.257.8731  
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## Part A - Project Description:

### 1. Grant Funding

The City has been awarded a grant, managed by the Washington State Department of Commerce, Growth Management Services, for a Housing Action Plan Implementation project.

### 2. Project Goals and Objective

The City's project includes a study and implementation of housing development incentives to encourage housing development in Everett while maximizing public value and using city resources efficiently.

### 3. The Rethink Housing Action Plan Action S-5

calls for coordination of a review and update of existing housing development incentives (market-rate and affordable) and recommendations for new incentives that will significantly increase the pace of housing production in the city while meeting policy goals including affordability for a wide range of economic and special needs segments of the population.

Specifically:

*Short Term Strategy 5: Coordinate a Development Incentives Study to provide guidance on changes and initial incentives for affordable housing construction and preservation.*

*Recommendation 2.2: Provide a detailed economic study of potential incentives in urban corridors.*

*Recommendation 4.4: Expand fee waivers for affordable housing.*

*Recommendation 4.6: Review and update the Multifamily Tax Exemption (MFTE) program.*

*Recommendation 4.7: Review and update development height incentives program for affordable housing units.*

### 4. Project deliverables include:

A draft report on **housing development incentive performance**, observations, stakeholder comments, and areas of concern.

- A. A draft report including review, analysis, and **recommendations of potential housing development incentives** and specifically addressing incentives along **urban corridors**.
- B. Draft **Ordinance for MFTE Program** updates.
- C. Draft **Ordinance for Unified Development Code Amendments** for development Incentives EMC Title 19
- D. Draft **Ordinance for Fee Waiver** program
- E. Final products for updated MFTE Program:
- F. **Ordinance** for adoption,
- G. Updated **background materials report**,
- H. **Program benchmark and monitoring template** to track use and effectiveness of program.
- I. Final Incentive program **ordinance** for adoption and updated **background materials report** for **Unified Development Code Amendments** for development Incentives EMC Title 19.
- J. Final Incentive program **ordinance** and updated **background materials report** for **Fee Waiver Program**.



## Part B City and Consultant Tasks:

### 1. Scope of Work

Grant Task	Grant Task Description	City Role	Consultant Role
<b>Action 1: Review the city’s existing housing development incentives, including recent examples, trends, and estimated impact on housing production. Review potential new housing development incentives permitted under state law and city charter and regulations. (Implementation Actions 2.2, 4.4, 4.6, and 4.7)</b>			
Step 1.1	Evaluate, update if needed, and apply the Economic Feasibility Analysis in Appendix G of the <a href="#">Rethink Housing Action Plan</a> as a basis for the review.	<ul style="list-style-type: none"> <li>• Provide report and background information to the consultant team.</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate the economic analysis and update if necessary.</li> </ul>
Step 1.2	<p>Review and propose adjustments to the city’s Multifamily Tax Exemption (MFTE) incentive program (EMC <a href="#">3.78</a>) with specific consideration of the <a href="#">2019 JLARC evaluation</a> of the state’s program, and other policy evaluations, as well as recent updates to the MFTE statute.</p> <p>Adjustments may include:</p> <ul style="list-style-type: none"> <li>• Revised and/or expanded target areas</li> <li>• Revised income qualifications thresholds for rental and owner-occupied units</li> <li>• Revised incentive period</li> <li>• New criteria for qualification, including potential incentives for larger units for larger families</li> <li>• Other conditions for providing affordable units</li> </ul>	<ul style="list-style-type: none"> <li>• Provide program background, history, current program status, and objectives for an updated program to the consultant team.</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate program performance and prepare draft report as described in Step 1.2.</li> <li>• Submit to city staff for review and comment. Incorporate changes as appropriate.</li> </ul>
Step 1.3	<p>Review the city’s height and density bonus program (EMC <a href="#">19.22.080</a>) including expansion areas:</p> <ul style="list-style-type: none"> <li>▪ potential for providing additional incentives</li> <li>▪ income thresholds</li> <li>▪ the in-lieu payment program</li> <li>▪ competition with other public benefits; and</li> <li>▪ expanding the program to include density bonuses for additional zones.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provide program background, history, current program status, and objectives to the consultant team for an updated calibrated incentive.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Evaluate program performance and prepare draft report as described in Step 1.3.</li> <li>▪ Submit to city staff for review and comment. Incorporate changes as appropriate.</li> </ul>



Grant Task	Grant Task Description	City Role	Consultant Role
Step 1.4	Review the city's affordable housing fee reduction and waiver program, including impact fees.	<ul style="list-style-type: none"> <li>• Provide program background, history, current program status and objectives for updating the incentive to the consultant team.</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate program performance and prepare draft report.</li> <li>• Submit to city staff for review and comment. Incorporate changes as appropriate.</li> </ul>
Step 1.5	Prepare a list of housing development incentives, including those currently in use elsewhere in Washington.	<ul style="list-style-type: none"> <li>• Provide context and suggest potential incentives for study to the consultant team.</li> </ul>	<ul style="list-style-type: none"> <li>• Research and evaluate array of housing development incentives used by other municipalities and agencies.</li> <li>• Prepare draft report. Submit to city staff for review and comment. Incorporate changes as appropriate.</li> </ul>
Step 1.6	Analyze individual project and cumulative financial impacts on city finances.	<ul style="list-style-type: none"> <li>• Provide fiscal analysis of the City's finances related to development applications, capital facilities, and property tax impacts to the consultant team.</li> <li>• Coordinate with the consultant team and representative projects to analyze.</li> </ul>	<ul style="list-style-type: none"> <li>• Analyze individual projects and cumulative financial impacts on city finances.</li> <li>• Submit to city staff for review</li> </ul>
Step 1.7	Review the list of new housing development incentives and report on feasibility, difficulty of implementation, estimated effect on housing production, affordability, and other policy goals, and other pros and cons including along urban corridors.	<ul style="list-style-type: none"> <li>• Review analysis and submit comments to consultant.</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare analysis.</li> <li>• Submit to city staff for review.</li> </ul>
Step 1.8	Conduct stakeholder outreach and hold at least one developer forum to gather input and advice from industry professionals and the community on pros and cons of the city's existing development incentives.	<ul style="list-style-type: none"> <li>• Attend outreach events when appropriate.</li> <li>• Review outcomes of outreach efforts.</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare project outreach informational materials that may include PowerPoint presentations, surveys, handouts, etc.</li> <li>• Submit to city staff for review prior to public release.</li> <li>• Coordinate with city staff to determine appropriate stakeholders.</li> <li>• Conduct stakeholder outreach events. (In-person or virtual open).</li> </ul>



Grant Task	Grant Task Description	City Role	Consultant Role
Step 1.9	Coordinate with other consultants and agencies conducting current housing initiatives including Housing Benefit District eTOD Tool Project (Sound Communities), Model Code Project (Sound Transit – FTA Grant), and the resilience-focused technical assistance - Everett project from the Urban Land Institute.	<ul style="list-style-type: none"> <li>• Provide contact information to the consultant.</li> <li>• Serve as liaison to the organizations and agencies.</li> </ul>	<ul style="list-style-type: none"> <li>• Coordinate with city staff on setting up interview sessions.</li> <li>• Review housing initiatives as identified.</li> </ul>
Step 1.10	Provide city staff, leadership, the planning commission, city council, stakeholders, and the public an opportunity to review and comment on proposed incentives	<ul style="list-style-type: none"> <li>• Provide contact information to the consultant.</li> <li>• Serve as liaison to the organizations and agencies.</li> <li>• Schedule city staff, leadership, planning commission, and city council meetings.</li> <li>• Coordinate with consultant team to determine appropriate stakeholders.</li> <li>• Provide public notice to events.</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare project outreach informational materials that may include PowerPoint presentations, surveys, handouts, etc.</li> <li>• Submit to city staff for review prior to public release.</li> <li>• Coordinate with city staff to determine appropriate stakeholders.</li> <li>• Hold meetings with city staff and leadership.</li> <li>• Attend and present project information to planning commission and city council.</li> <li>• Conduct stakeholder outreach events. (In-person or virtual).</li> </ul>
<b>Deliverable 1a</b>	<b>Draft report on housing development incentive performance, observations, stakeholder comments, and areas of concern.</b>	<b>Review draft report prior to public release and circulation and provide feedback and comments.</b>	<b>Following completions of Steps 1.1 through 1.4, and 1.8. Submit draft report to city staff for review and comment.</b>
<b>Deliverable 1b</b>	<b>Draft report including review, analysis, and recommendations of potential housing development incentives and specifically address incentives along urban corridors.</b>	<b>Review draft report prior to public release and circulation and provide feedback and comments.</b>	<b>Follow completion Steps 1.5 through 1.10. Submit</b>



Grant Task	Grant Task Description	City Role	Consultant Role
<b>Action 2 Develop draft Ordinances of proposed new and revised incentives based on community and stakeholder input in addition to Planning Commission and City Council guidance.</b>			
Step 2.1	Work with city staff to publish materials online and schedule and hold a planning commission review of draft Recommendations Report, including a public hearing.	<ul style="list-style-type: none"> <li>• Publish materials on webpage.</li> <li>• Provide public notice of Public Hearing.</li> <li>• Schedule planning commission meeting.</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare project outreach informational materials that may include PowerPoint decks, surveys, handouts, etc.</li> <li>• Submit city staff for review prior to public release.</li> <li>• Hold meetings with city staff and leadership.</li> <li>• Attend and present project information to planning commission</li> </ul>
Step 2.2	Coordinate and review with all stakeholders, including consultants and agencies specifically identified in Step 1.8 and 1.9, comments on draft recommendations.	<ul style="list-style-type: none"> <li>• Attend outreach events when appropriate.</li> <li>• Review outcomes of outreach efforts.</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare project outreach informational materials that may include PowerPoint presentations, surveys, handouts, etc.</li> <li>• Submit city staff for review prior to public release.</li> <li>• Conduct stakeholder outreach interview/events. May include in-person or virtual open houses or forums.</li> </ul>
Step 2.3	Develop draft ordinances and background materials to implement the recommendations.	<ul style="list-style-type: none"> <li>• Provide ordinance format to consultant team.</li> </ul>	<ul style="list-style-type: none"> <li>• Draft ordinance and background materials.</li> <li>• Submit to city staff for review.</li> </ul>
Deliverable 2a	<b>Draft Ordinance for MFTE Program updates</b>	<ul style="list-style-type: none"> <li>• <b>Complete City's role for Steps 2.1 through 2.3.</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Complete Consultant's role for Steps 2.1 through 2.3.</b></li> </ul>
Deliverable 2b	<b>Draft Ordinance for Unified Development Code Amendments for development Incentives EMC Title 19</b>	<ul style="list-style-type: none"> <li>• <b>Complete City's role for Steps 2.1 through 2.3.</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Complete Consultant's role for Steps 2.1 through 2.3.</b></li> </ul>
Deliverable 2c	<b>Draft Ordinance for Fee waiver program</b>	<ul style="list-style-type: none"> <li>• <b>Complete City's role for Steps 2.1 through 2.3.</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Complete Consultant's role for Steps 2.1 through 2.3.</b></li> </ul>
<b>Action 3 Prepare final ordinances for the incentives program with background materials and conduct Public Hearings with Planning Commission and City Council.</b>			
Step 3.1	Prepare final ordinances for the incentives program.	<ul style="list-style-type: none"> <li>• Provide ordinance format to consultant team.</li> </ul>	<ul style="list-style-type: none"> <li>• Draft ordinance and background materials.</li> <li>• Submit ordinance and materials to city staff for review.</li> </ul>
Step 3.2	Prepare a program benchmark and monitoring template to track the use and effectiveness of the city's development incentive program.	<ul style="list-style-type: none"> <li>• Review proposed program tools and provide comments to consultant.</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare program tools.</li> <li>• Submit to the city staff for review.</li> </ul>



Grant Task	Grant Task Description	City Role	Consultant Role
Step 3.3	Conduct Public Hearings with Planning Commission and City Council.	<ul style="list-style-type: none"> <li>• Publish materials on webpage.</li> <li>• Provide public notice of Public Hearing.</li> <li>• Schedule planning commission meeting.</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare project outreach informational materials that may include PowerPoint presentations, surveys, handouts, etc.</li> <li>• Submit to city staff for review prior to public release.</li> <li>• Hold meetings with city staff and leadership.</li> <li>• Attend and present project information to planning commission and city council.</li> </ul>
Deliverable 3a	Final Incentive program ordinance and updated background materials report for MFTE Program updates	Complete City's role for Steps 3.1 through 3.3.	• Complete Consultant's role for Steps 3.1 through 3.3.
Deliverable 3b	Final Incentive program ordinance and updated background materials report for Unified Development Code Amendments for development Incentives EMC Title 19	Complete City's role for Steps 3.1 through 2.3.	Complete Consultant's role for Steps 3.1 through 3.3.
Deliverable 3c	Final Incentive program ordinance and updated background materials report for fee waiver program	Complete City's role for Steps 3.1 through 3.3.	Complete Consultant's role for Steps 3.1 through 3.3.

## 2. Project Schedule

The terms of the State Grant Contract require that funded projects must be completed and submitted by no later than April 30, 2023. Actions and deliverables to the City must proceed under the following schedule:

	Action 1		Action 2		Action 3
	Deliverables Due		Deliverables Due		Deliverables Due
1a	08/01/2022	2a	12/01/2022	3a	02/01/2023
1b	08/30/2022	2b	12/01/2022	3b	02/01/2023
		2c	12/01/2022	3c	02/01/2023

## 3. Task Estimates

The grant specifies that deliverables shall not exceed the amount shown as follows:

1a.	Housing development incentive performance draft report.	\$25,000.00
1.b.	Recommendations of potential housing development incentives draft report.	\$25,000.00
2.a.	Draft Ordinance for MFTE Program updates.	\$5,000.00
2.b	Draft Ordinance for Unified Development Code Amendments for development Incentives EMC Title 19.	\$5,000.00
2.c.	Draft Ordinance for Fee waiver program	\$5,000.00



3.a.	Final ordinance containing updated MFTE Program Updates.	\$9,000.00
3.b.	Updated background materials report and final ordinance containing amendments for development incentives in EMC Title 19 Incentive Program for Unified Development Code.	\$8,000.00
3.c.	Adopted Incentive program ordinance and updated background materials report for fee waiver program.	\$8,000.00

#### 4. Previous and Current Studies

The following plans, studies, and housing initiatives completed or in progress and are expected to inform the project and should be coordinated and reviewed by the successful consultant team. Other material may be provided as background information.

1. [Rethink Housing Action Plan](#)  
The Housing Action Plan is a set of short- and long-term recommended strategies intended to address the housing needs of the community. This Plan was developed as part of the [Mayoral Directive](#) issued in December 2020. Additional project information can be found on the project [webpage](#).
2. [Everett Comprehensive Plan](#)  
The Comprehensive Plan is the city’s twenty-year growth plan. The Plan includes city background and context along with goals and policies directing future development patterns.
3. [2019 JLARC Final Report - Property Tax Exemption for Multifamily Housing in Urban Areas](#)  
The Washington State Joint Legislative Audit and Review Committee released a report on their performance review of the Multifamily Tax Exemption program authorized under RCW 84.14.007. The report provides valuable program background.
4. [Sound Communities, ETOD - Housing Benefit District](#)  
Sound Communities received a grant from the State Department for a Transit-Oriented Development Handbook. The legislation that authorized the grant funding required the grantee to work with the cities of Everett, Renton, and Tacoma during the development of the handbook. Included in the work is an analysis of potential legislation that could authorize jurisdictions to create a Housing Benefit District. This effort is currently in process.
5. [Resilience-focused technical assistance - Everett project from the Urban Land Institute](#)  
The Urban Land Institute is working with the city on an area-focused technical assistance forum related to community resilience. This project is currently in process.



## Part C Submittal and Selection

### 1. Submittal Content

The statements of qualifications shall be limited to twenty (12), single-sided, 8 ½" x 11" pages. The front and back cover shall not be considered a page. No additional information or pamphlets will be considered by the selection committee.

Proposals submitted for this project must include the following information:

- A. **Introductory Letter** including the organization name, address, contact person, email, and reason your organization should be selected for this work.
- B. Statement of Qualification, including:
  - a. Qualifications and Experience
    - i. Describe your company. Include how long the company been in business. Describe the qualifications of your company, its business experience and achievements including fiscal knowledge and cyclical trends of housing development processes and cost, economic conditions and trends in Washington State, Central Puget Sound, and Everett, and knowledge of state and local legislation and programs related to the project subject matter.
    - ii. Who are you proposing to be the project manager if awarded this contract? What is their experience with this work and other aspects pertinent to this project? What are their years of experience, years in industry, years with firm, etc.?
    - iii. Provide a list of three major projects including references that the project manager has been involved in and their role with similar relevant topics to this project.
    - iv. Provide names, tenure, roles and responsibilities for each key team member engaged in providing the related services.
- B. **Community Knowledge**
  - a. Provide information that identifies your knowledge of land use, housing, and transportation issues in Everett.
  - b. What studies, projects or other analysis have you completed in or near Everett?
  - c. What other knowledge of the region does your firm(s) have that would be of benefit to the City in this effort?
- C. **Availability and Capacity**
  - a. What is your firm's availability between June 2022 and April 2023?
  - b. Describe your firm's ability to complete the project to meet project deliverable deadlines.
  - c. What other work does your firm have under way or is anticipated to be in progress during the time frame of this project?
- D. **Project Approach**
  - a. Describe your firm's understanding and approach to performing the scope of work.
  - b. The proposal should respond with specific details about how each of the listed task will be address.
  - c. Describe any projects where your firm took an innovative approach to respond to the project's goals and objectives. Provide the specific innovation(s).
- E. **Budget Proposal**
  - a. Provide estimated billable hours, cost per hour, and hours per task for each individual on the consultant team.
  - b. Indicate Key staff availability to conduct the scope of work.
  - c. Total overall price and cost breakout for each task.



- d. The proposal has a not to exceed amount of \$100,000 (see scope of work).

## 2. Selection Criteria

The Selection Committee will evaluate proposals using the scoring list here:

1. Qualifications:	30 points
2. Community Knowledge	10 points
3. Availability	10 points
4. Project Approach	30 points
5. <u>Budget Proposal</u>	<u>10 points</u>
Total	100 possible points

Based on the proposals, the City may enter into one or more professional service agreements to accomplish the tasks identified in this RFP. The scope of services will be negotiated with the most qualified firms. If negotiations are not successful, the City may begin negotiations with the second most qualified firm.

Following the interviews, the successful firm will be notified by the City.

## 3. Conditions of the Agreement

The City will enter into a Professional Services Agreement, which will establish a maximum contract amount. The form of contract used for this project is the City of Everett standard Professional Services Agreement.

### A. Americans With Disabilities Act (ADA) Information

The City of Everett in accordance with Section 504 of the Rehabilitation Act (Section 504) and the Americans with Disabilities Act (ADA), commits to nondiscrimination on the basis of disability, in all of its programs and activities. This material can be made available in an alternate format by emailing Shaun Bridge at [SBridge@everettwa.gov](mailto:SBridge@everettwa.gov) or by calling (collect, if need be) 425.257-8823.

### B. Title VI Statement

The City of Everett in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, subtitle A, Office of the Secretary, Part 21, nondiscrimination in federally assisted programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises as defined at 49 CFR Part 26 will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, national origin or sex in consideration for an award.

