

Program Contact

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Available Funding

\$3 million – Regional Early Action Program (REAP)

Funding Requirements

Min-Max Grant Award

\$125,000 - \$500,00
(\$500,000 maximum per project)

Match Requirement:

A match is not required; however, points are awarded based on evidence of matching funds.

Eligible Applicants

Cities in the County of San Diego and the County of San Diego

Example Projects

Must have a nexus to housing production, such as:

- Staff Augmentation
- ADU Ordinances
- Environmental documents directly connected to a proposed HAP planning project

Other examples can be found under the section entitled “List of Resources”.

Overview

Program Description

The San Diego Association of Governments (SANDAG) is soliciting applications for its Housing Acceleration Grant Program. The Housing Acceleration Program (HAP) aims to fund planning activities that will accelerate housing production, facilitate implementation of the 6th Cycle Regional Housing Needs Assessment (RHNA), and build local jurisdictions’ capacity to compete for funding statewide through the California Department of Housing and Community Development (HCD) Prohousing Designation Program. The HAP program provides grants and technical assistance to local jurisdictions to accelerate housing production as well as promote equity and sustainability in housing planning and production.

Funding Source

California Department of Housing and Community Development Regional Early Action Planning (REAP) Grant

Fiscal Year(s) of Funding: 2021-2024

Minimum Eligibility

Project area must include a regionally defined priority area for smart growth, and:

- Jurisdiction has adopted (or is in the process of developing) a Climate Action Plan (CAP)
- Project application must identify the ability to achieve at least one goal in the Pro Housing policy implementation section
- Provide adequate Civil Rights Assurances
- Adhere to SANDAG Board Policy No. 035

Timeline

Activity	Date
Release of the CFP	11/19/2021
Applicant Workshop (1-3 p.m.)	12/7/2021
CFP Question Deadline (by 5 p.m.)	1/7/2022
Responses to all questions released in BidNet	1/14/2022
Application Deadline (by 5 p.m.)	1/21/2022
Notice of Intent to Award (PAC Recommendation)	3/4/2022
Notice of Award (Board Approval)	3/11/2022
Grant Agreements Executed/Notices to Proceed Issued	4/11/2022

Attachments

Attachment A – Housing Acceleration Program Application

Attachment B – Housing Acceleration Program Sample Grant Agreement

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I. Glossary of Key Terms

California Department of Housing and Community Development (HCD) is the State agency administering the Regional Early Action Planning Grant (REAP).

BidNet is a procurement platform and vendor portal that is hosted by BidNet direct. It is the exclusive online vendor portal used to post and notify prospective applicants of current SANDAG grant opportunities. Potential applicants will use BidNet to download the CFP materials, submit questions and obtain answers regarding the CFP, and to submit their application materials. BidNet is available at www.bidnetdirect.com/sandag/sandag-grants.

Grantee is an organization that has been awarded funding through the Housing Acceleration Program (HAP) and has entered into a grant agreement with SANDAG.

Grant term is the period of time in which expenses for project-related activities can be incurred to be eligible for reimbursement.

HCD ProHousing Designation Program is a program developed by HCD and provides incentives to cities and counties in the form of additional points or other preference in the scoring of competitive housing, community development, and infrastructure programs.

Local Early Action Planning (LEAP) provides over-the-counter grants complemented with technical assistance to local governments for the preparation and adoption of planning documents, and process improvements that: 1. Accelerate housing production 2. Facilitate compliance to implement the sixth-cycle Regional Housing Needs Assessment.

Matching funds is the amount of funding other than the grant award that goes towards the total project cost. It is often represented as a percentage of the total project cost.

Match percentage is calculated by dividing the total match amount by the sum of the matching funds and the grant award.

Regional Early Action Planning (REAP) is a grant program that provides one-time grant funding to regional governments and regional entities for planning activities, which will accelerate housing production and facilitate compliance in implementing the sixth cycle of the Regional Housing Needs Allocation.

Regional Housing Needs Assessment (RHNA) is codified in state law at Government Code Section 65580, *et seq* and quantifies the need for housing and informs land use planning in addressing identified existing and future housing needs resulting from population, employment, and household growth. SANDAG is responsible for overseeing the RHNA process for the San Diego region. SANDAG is currently overseeing the 6th cycle RHNA, which covers the planning period from 2021-2029.

Sustainable Communities On-Call is a new consultant services on-call for Sustainable Communities planning to implement additional pro-housing activities and the Regional Plan Sustainable Communities Strategy. This procurement will be conducted so that local agencies can utilize these services without the need to conduct their own competitive procurement.

Total Project Cost is calculated as the sum of the grant award and the matching funds.

II. List of Resources

Below is a list of resources referenced in this CFP and a description of how to use these resources.

Resource/Links	What to do?
SANDAG Contract Webpage	Access the Grant Program Protest Procedures
BidNet Direct	Access the CFP materials, submit and receive responses to questions, receive any updates to the CFP, and submit completed application(s) for consideration
SANDAG Board Policy No. 035	Review the Board Policy that governs SANDAG’s Competitive Grant Programs. An overview is provided in this CFP.
SANDAG 6th Cycle Regional Housing Needs Assessment	Is mandated by state law, quantifies the need for housing and informs land use planning in addressing identified existing and future housing needs resulting from population, employment, and household growth.
REAP Notice of Funding Availability (NOFA)	Review the Guidelines and requirements that SANDAG and REAP recipients are bound to.
REAP Eligible Activities Best Practices Examples	A working document from HCD that provides examples of REAP best practices from across the State.
SANDAG Regional Housing Incentive Program Pro-housing Best Practices	A 3-phase literature review research project that establishes a baseline of information about regional housing trends, develops an understanding of pro-housing best practices, and provides supportive information to guide REAP eligible activities in the San Diego region.
HCD Housing Planning Hub Site	Provides resources for accelerating housing production.
HCD Affirmatively Furthering Fair Housing (AFFH) Data and Mapping Resources	Cities and counties can use this interactive resource from HCD to fulfill a state obligation to proactively combat discrimination and increase access to safe, affordable homes near jobs, schools, healthcare, and parks for all Californians, especially those who face barriers because of their race, sex, income, and other characteristics. In this tool, users can explore data relating to Fair Housing Enforcement, Segregation and Integration, Disparities in Access to Opportunity, Disproportionate Housing Needs, Racially/Ethnicity Concentrated Areas of Poverty, and more.

III. Background

A. About SANDAG

The San Diego Association of Governments (SANDAG) is the primary public planning, transportation, and research agency for the San Diego region, which consists of the 18 cities and County of San Diego. SANDAG serves as the public forum for regional policy decisions about growth, transportation, environmental management, housing, open space, energy, public safety, and binational collaboration.

SANDAG's vision is to pursue a brighter future for all people living, working, or recreating in the San Diego region. To this end, SANDAG plans and implements projects that seek to use land more wisely, build a more efficient and accessible transportation system, protect the environment, improve public health, promote a strong regional economy, better manage our access to energy, incorporate equity into the planning process, address pressing needs on tribal lands, and support a vibrant international border.

SANDAG receives local, state, and federal funds to implement regional policies, programs, and projects that advance its vision. SANDAG passes through a portion of the funding it receives through several competitive grant programs. These grant programs provide local, state, and federal funding to local jurisdictions, nonprofits, and other partners to accomplish regional goals at the local level. Grants awarded range from infrastructure projects to habitat management and monitoring efforts to specialized transportation services for senior and disabled populations. While each individual grant program maintains a particular focus, all work together to enhance our region's quality of life.

B. Housing Acceleration Program (HAP)

1. Overview

In July 2019, the California Legislature passed Assembly Bill (AB) 101 (Committee on Budget), establishing the Local Government Planning Support Grant Program to provide regional governments with one-time state funding for planning activities to meet the 6th Cycle Regional Housing Needs Assessment. Grant funding is allocated using a population-based formula. SANDAG is eligible to receive \$6.8 million through the Regional Early Access Planning (REAP) program, and the California Department of Housing and Community Development (HCD) is responsible for administering the program. With REAP funding, the HAP aims to fund planning activities that will accelerate housing production, facilitate compliance with the 6th cycle RHNA, and build local jurisdictions' capacity to compete for funding statewide through the HCD Prohousing Designation Program. The program provides grants and technical assistance to local jurisdictions to build their housing production. The program also seeks to promote equity and sustainability in housing planning and production.

In addition to project funding, the HAP project recipients will have access to consultant services on an on-call basis for Sustainable Communities Planning services to implement additional prohousing activities and the Regional Plan Sustainable Communities Strategies. Jurisdictions will be able to use the on-call consultants directly without conducting their own separate competitive procurement.

2. Goals and Objectives

The Housing Acceleration Program has the following goals and objectives:

Goals:

- Increase housing and promote development that results in the production of more affordable housing units
- Streamline local development approvals
- Address displacement and promote equity in the region
- Increase housing near transit and other non-single occupancy vehicle mobility choices
- Promote greenhouse gas emissions reduction and resilience to climate change impacts through accelerating housing production
- Implement the Regional Plan
- Direct resources towards activities and projects that build the funding competitiveness of the San Diego Region

Objectives:

- Directly provide local governments with grant funding that will aid in the acceleration of housing production
- Fund housing activities that support use of existing and future transit services, other alternatives to driving alone, and development around mobility hubs
- Ensure the promotion of social equity and sustainability
- Encourage jurisdictions to pursue the HCD Prohousing designation and provide resources for jurisdictions to implement Prohousing policies

IV. Eligibility

A. Eligible Applicants and Projects

1. Eligible Applicants

- **Individual Jurisdictions:** Eligible applicants include the 18 incorporated cities in the SANDAG region and the County of San Diego.
- **Partnerships:** Jurisdictions can opt to work together on an application to conduct eligible activities consistent with the goals and objectives of this program. Jurisdictions also may partner with a community-based organization (CBO) or nonprofit providing services in the San Diego region to ensure the benefits of their activities are realized by a broad population and in an equitable manner. Only the 18 cities and County of San Diego are eligible to serve as the lead applicant and grantee.
 - Applicants forming partnerships must provide a letter of support from each jurisdiction, CBO, or nonprofit.

Only one application may be submitted per jurisdiction as an individual jurisdiction. Up to two applications may be submitted for jurisdictions forming partnerships.

To be eligible to receive grant funds, an applicant/partnership must comply with all of the following:

- Have the technical and financial capacity to implement the proposed project if awarded.
- Have established Civil Rights Assurances that include adequate methods for ensuring that the benefits of the project are distributed equitably.
- Be eligible to do business with the government. SANDAG will conduct a pre-award risk assessment, including but not limited to, verifying the suspension or debarment status of the applicant using SAM.gov.
- Comply with the provisions of the grant agreement.
- Be willing to provide the required insurance and execute a grant agreement for a HAP project in the same form (Attachment B) as attached to this CFP within the timelines noted in this CFP.

2. Eligible Projects and Project Types

To be eligible, a project must meet the following criteria:

- Project area must include a regionally defined priority area for smart growth.
- Jurisdiction has an adopted (or is in the process of developing a Climate Action Plan (CAP)
- Project application identifies the ability to achieve at least one Prohousing activity from among those listed in the program application (Attachment A).
- The application must be signed by an authorized representative of the lead applicant(s), such as the city manager or other authorized individual under the applicant's policies and procedures and demonstrate the applicant's willingness to participate and fulfill the program requirements. If applying in a partnership, each jurisdiction under the partnership must have an authorized representative sign the application.
- The project must be completed by June 30, 2023.
- Applications must include a project budget and a clear description of how funding will be used in the project budget table included in Attachment A of this CFP. Applicants are encouraged to add budget detail that includes quotes for products and services.
- The application must demonstrate a direct connection between the proposed activities and the program's goal to accelerate housing production.
- Project activities must illustrate their reach to the entire project area and describe the effort that will be made to reach low-income, disabled, and minority communities within the project area.
- Projects must not have alcohol, political, religious, or discriminatory themes or affiliations.

The Program will fund housing planning projects and activities. Projects eligible for funding under this Program must meet Program goals and objectives and result in a deliverable, such as a policy or program, that will help to accelerate housing production. Applicants should also describe how they plan to promote equity in housing production, promote sustainability, and/or drive development around transit.

Projects must demonstrate a nexus to increasing housing and accelerating housing production. Some examples are provided below, but are not intended to be an exhaustive list:

- Projects may be coordinated or combined with Local Early Action Planning (LEAP) Grant program projects
- Technical assistance in improving housing permitting processes, tracking systems, and planning tools
- Establishing regional and countywide housing trust fund for affordable housing (e.g. planning activities and processes, guidelines, and charters)
- Performing infrastructure planning that prioritizes infill development
- Perform feasibility studies to determine the most efficient locations to site housing consistent with Government Code Sections 65040.1 (State Planning Priorities) and 65080 (regional transportation plans)
- Covering the costs of temporary staffing or consultant needs associated with eligible activities
- Other actions to accelerate additional housing production

Additional examples of eligible projects can be found in [REAP Eligible Activities Best Practices Examples](#).

B. Eligible Expenses

Eligible expenses must be directly related to the execution of the scope of work proposed in the application and finalized in the executed grant agreement. Projects that are already underway are eligible to apply ONLY if the application meets the Housing Acceleration Program requirements, and either requests funds for additional work beyond the scope of the project that is underway or the application requests funds for additional work beyond what has been funded by a Local Early Action Planning (LEAP) Grant.

- Direct Costs. Grant funds may be used toward local agency salaries, professional services, or planning project activities, and other direct expenses incurred on behalf of the project.
- Grant funds may be used to cover the costs of temporary staffing or consultant needs associated with eligible activities.
- Grant funds shall be used for the costs of preparing and adopting the proposed Eligible Activity or Activities.
- A jurisdiction that receives funds under REAP may use a subcontractor. The subcontract shall provide for compliance with all the requirements of the HAP and REAP.

SANDAG will only reimburse costs that were actually incurred for the project after the Notice to Proceed has been issued, and up to the amount awarded in the Grant Agreement. In the event of project cost overruns, SANDAG will not pay more than the original amount specified in the grant agreement.

C. Ineligible Activities and Expenses

Ineligible projects and activities are those that do not align with program goals and objectives. The following activities and expenses are ineligible for reimbursement:

- Activities unrelated to accelerating housing production;
- Activities unrelated to preparation and adoption of planning documents, and process improvements to accelerate housing production.
 - SANDAG may consider applications that include the activities listed above if a significant housing component is also present and the net effect on accelerating housing production is positive. For example, an applicant may propose combining an open-space designation, downzoning, preservation or anti-displacement measures with by-right upzoning that has a significant net gain in housing capacity);
- Activities that obstruct or hinder housing production, e.g., moratoriums, downzoning, planning documents with conditional use permits that significantly impact approval certainty and timing, planned development, or other similarly constraining processes;
- Capital financing, operation or funding related to programs of individual housing development projects; and
- Administrative costs of persons employed by the grantee for activities not directly related to the preparation and adoption of the proposed Activity or Activities;
- Costs for work performed prior to SANDAG issuing a Notice to Proceed to the grantee;
- Indirect costs such as fringe benefits, office space, utilities, insurance, etc.
- Claims or litigation costs

V. Funding

A. Available Funding

Approximately \$3 million is available through this CFP.

SANDAG reserves the right to partially fund grants, and to fund less than the amount available in a given grant cycle. See the section entitled “Partial Awards”.

B. Minimum and Maximum Grant Awards

There are limits to the amount of funding that may be awarded per project and per applicant. Projects that meet minimum eligibility requirements listed in the program application will receive at least \$125,000 in grant funding. Remaining funds will be allocated based on a competitive process to the highest scoring projects, up to \$500,000 per project.

1. Per Project

The minimum and maximum grant awards per project type is included in the table below.

Project Type	Minimum Award	Maximum Award
<i>Per Project</i>	<i>\$125,000</i>	<i>\$500,000</i>

2. Per Jurisdiction

Jurisdictions may choose to submit up to two projects for funding consideration, including projects where they are a partner, and may request up to the maximum grant award for each project proposed. The maximum amount an individual jurisdiction may be awarded, including projects where a jurisdiction is a partner, is \$1 million. If the combined grant request amount of projects proposed by an individual jurisdiction recommended for funding exceeds the maximum “per jurisdiction” grant award, then a partial award may be awarded for one or more of the jurisdiction’s projects.

C. Partial Awards

Given the competitive nature of the grant program and the finite amount of funds available through this CFP, applicants may receive partial awards. SANDAG will not award a partial grant for an amount less than the minimum grant award amount.

SANDAG handles partial awards differently based on the scalability of a project. Below are descriptions of scalable and non-scalable projects:

- Scalable projects. A scalable project is a project whose scope of work can be reduced and still further the grant program goals while providing significant value to the public intended to benefit from the project. SANDAG staff will consider how the project would have scored in the competitive process if the scope of work were reduced. If the project would have scored substantially the same with the scaled-down scope of work and the scaled-down project would further the grant program goals and provide significant value to the public, then the project may be scaled.
- Non-scalable projects. A non-scalable project is a project whose scope of work cannot be reduced because doing so (a) is not possible, (b) would create an incomplete project that contributes little to the grant program goals or provides little value to those intended to benefit from the project, and/or (c) would have scored substantially differently in the competitive process with a reduced scope of work.

SANDAG at its sole discretion will determine whether a project is scalable or non-scalable using the definitions listed above.

Applicants whose projects are recommended for partial award and are scalable will be required to work with SANDAG staff prior to grant agreement execution to alter the scope of work, budget, and schedule submitted as a part of the application to reflect a reduced scope of work.

Applicants whose projects are recommended for partial award and cannot be scaled will be asked if they would like to accept the partial funding award with the condition that the entire project as proposed in the scope of work included in the application must be completed. Applicants will be required to contribute a larger amount of matching funds than proposed to complete the project scope of work or “make the project whole.” If an applicant cannot come up with the necessary matching funds and declines the partial funding award, the award will be offered to the next highest-ranked project on the ranked project list. (See the section entitled “Application Evaluation Process”.) If no applicant accepts the funding, the funding will be used for regional projects (e.g regional displacement study, capital mapping, etc.) and/or other eligible activities under REAP guidelines.

D. Match Requirement

1. Minimum Match Requirement

There is no match required; however, points will be awarded based on evidence of matching funds.

2. Eligible Matching Funds

Matching funds must be from a source other than the grant funding source. Eligible match sources include:

- Cash
- Local funding sources
- State funding sources
- In-kind services

Applicants are required to provide adequate documentation of matching funds and the match source(s) in the application.

E. Indirect Costs

Indirect costs typically include rent, insurance, copying expenses, fringe benefits, and other costs not directly charged to the grant project and are typically supported by the local jurisdiction's general fund. HAP funds may not be used toward indirect costs, including overhead. If the budget includes indirect costs, Grantees will be required to pay for these costs using matching funds.

F. Expenditure Deadline/Grant Term

SANDAG has flexibility in executing grant agreements and issuing a Notice to Proceed, which marks the beginning of the grant term and the period when expenses are eligible for reimbursement. The grant agreement execution window is anticipated to occur in Spring 2022. REAP funds must be expended by grantees no later than June 30, 2023. In order to meet this deadline, all grant agreements will contain a grant expiration date of June 30, 2023.

VI. Other Program Requirements

A. SANDAG Board Policy No. 035

[SANDAG Board Policy No. 035](#) "Competitive Grant Program Procedures" applies to all grant programs administered through SANDAG.

1. Grant Agreement Execution

Board Policy No. 035 requires grantees to sign a grant agreement within 45 days of receiving the grant agreement from SANDAG. Applicants are encouraged to review the sample grant agreement included in this CFP to ensure compliance with this provision of Board Policy No. 035. Failure to sign and return the grant agreement promptly may result in revocation of the grant award.

2. “Use It or Lose It”

Board Policy No. 035 includes a “use it or lose it” policy, which requires that grantees make diligent and timely progress toward the completion of the grant project within the timelines set forth in the project schedule. Failure to meet project milestones and deadlines may result in the early termination of the grant agreement.

Per Board Policy No. 035, grantees may request and be granted up to a six-month extension at the SANDAG staff level. Due to the REAP expenditure deadline from HCD however, no requests for time extensions beyond the initial grant term will be granted.

B. Progress Reports, Invoices, and Matching Funds

1. Progress Reports

Grantees must complete and submit quarterly progress reports with documentation in conjunction with an invoice in order to receive reimbursement. Subcontracts with consultants or contractors must be submitted with the first report containing their work. Grantees may be required to use specific report templates and an online platform for submission to SANDAG

SANDAG will measure grant performance against the stated project goals and deliverables in the project scope of work included in the grant agreement. Poor performance may be grounds for termination of the grant agreement and revocation of the grant.

Final reports must be submitted no later than August 31, 2023. Final reports should detail project activities, challenges, successes, and a description of how the project is expected to accelerate housing.

2. Invoices

Grant funding is by reimbursement only. Funds will not be disbursed until a grant agreement has been approved and fully executed by SANDAG and the grantee. Project expenses incurred by the grantee prior to execution of a grant agreement are not eligible for reimbursement. To be reimbursed for project expenses, grantees must submit an invoice packet consisting of an invoice, documentation of all project expenses, and a progress report. Grantees are required to submit invoices quarterly. Grantees may be required to use specific invoice templates and an online platform for submission to SANDAG. Grantees must conform to the following in order to qualify for reimbursement:

- Staff costs must be submitted with certified payroll records.
- Consultant invoices must be submitted with proof of payment.
- Receipts or invoices must be detailed, dated, and be directly related to the project scope of work.

SANDAG requires final invoices to be submitted by August 31, 2023. Invoices that are received after this deadline are not guaranteed to be reimbursed by SANDAG. Expenses must be directly related to the contracted scope of work and paid during the eligible project implementation period (April 11, 2022 – June 30, 2023).

3. Matching Funds

If the grant agreement contains matching funds, Grantees must provide a match amount per invoice such that the cumulative match percentage is equal to or greater than the match percentage required under the grant agreement. Grantees will not receive reimbursement if the cumulative match percentage falls below the required percentage specific to the project or if grantee fails to provide sufficient documentation of project expenses.

C. Public Record and Record Retention Policy

All applications submitted in response to this CFP become the property of SANDAG and are considered a public record. As such, applications and other project-related documentation may be subject to public review per [SANDAG Board Policy No. 015: Records Management](#).

Grantees must retain project-related documents for at least three years after receipt of final payment and make these documents available to SANDAG upon request.

D. Insurance Requirements

Awarded applicants will be required to provide proof of insurance. The required insurance certificates (or proof of self-insurance for public entities) and endorsements must comply with all requirements included in the grant agreement and must be provided prior to grant agreement execution. Grantees are encouraged to submit their certificate(s) of insurance following issuance of the Notice of Intent to Award to ensure there is no delay in executing a grant agreement.

E. Notice of Prevailing Wage

California law requires that public works projects pay prevailing wages for workers. As applicable, grantees are required to comply with the provisions of California Labor Code Sections 1775 et seq, which includes the payment of prevailing wages to all workers performing prevailing wage work. Additional details can be found in the grant agreement.

F. Required Forms

Applicants are required to submit the following forms. These forms are included in the Application.

- Public Contract Code Section 10162 Questionnaire
- Public Contract Code Section 10232 Statement
- Equal Employment Opportunity Certificate

VII. Application and Submittal Process

A. Application Materials

Application materials are available online at <https://www.bidnetdirect.com/sandag/sandag-grants>. Applicants are responsible for downloading relevant application materials for their use in developing and submitting an application.

Applicants will submit their completed application (Attachment A) with all required signatures by the Application Deadline.

- The application shall address the Eligibility and Submittal Requirements and indicate which program goal and objective(s) the proposed project will align with.
- The application will indicate which eligible activity category the proposed project falls under and indicate whether the applicant would like to use the related consultant on-call category to conduct the proposed project.
- If submitting a partnership application, the application will list all partner jurisdictions (or non-profit organization) and include the required representatives' signature(s) from each jurisdiction (or non-profit organization).

An incomplete application may be disqualified. For an application to be considered complete, it must include the following documents:

- Application (see Attachment A) with signature of authorized representative(s)
- Scope of Work
- Budget

SANDAG reserves the right to cancel or revise, for any or no reason, in part or in its entirety, this CFP. If SANDAG revises and/or cancels the CFP prior to the deadline for applications, applicants will be notified by email.

B. Applicant Workshop and Questions

1. Pre-Application Workshop

SANDAG will host a public workshop on December 7, 2021 to provide an overview of this CFP, the application process, and to address any questions. SANDAG staff will also provide information and address questions on the eligibility, approval, contracting, and specific requirements of this grant program. This workshop will be held virtually. SANDAG will post the virtual meeting link and other details on BidNet.

2. Call for Projects Questions

Potential applicants may submit questions through the SANDAG web-based vendor portal BidNet Direct, available at <https://www.bidnetdirect.com/sandag/sandag-grants>. Questions submitted after the Question Deadline or outside of BidNet will not be answered.

C. Submittal Process

Applicants shall submit application documents via the SANDAG web-based vendor portal BidNet Direct, available at <https://www.bidnetdirect.com/sandag/sandag-grants>. Applications submitted by mail, facsimile, or email in lieu of electronic copies uploaded to the online web-based portal will not be acceptable and will not be considered. Any application that is missing pages or cannot be opened for any reason may be considered unresponsive.

Applicants are responsible for fully uploading their entire application before the stated deadline. It is the applicant's sole responsibility to contact the SANDAG bid management provider, BidNet, to resolve any technical issues related to electronic submittal, including, but not limited to, registering as a vendor, updating password, updating profiles,

uploading/downloading documents, and submitting an electronic offer, prior to the submission deadline. BidNet Direct's Vendor Support team is available Monday-Friday from 5 a.m. to 5 p.m. Pacific Time at (800) 835-4603 or e-procurementsupport@bidnet.com.

VIII. Application Evaluation Process and Awards

A. Eligibility Screening

SANDAG staff will perform an eligibility screening of all submitted applications. An eligibility screening involves verifying that an applicant and the proposed project(s) meet the eligibility requirements included in this CFP as well as performing a pre-award risk assessment. A pre-award risk assessment is an examination of an applicant's fiscal and operational capabilities to specifically assess the risk associated with allowing the applicant to expend grant funds. A pre-award risk assessment will include accessing SAM.gov to verify that an applicant has not been suspended, debarred, or otherwise excluded from receiving government contracts. It also may include reviewing the applicant's financial statements, audit findings, and past performance in managing previous grant awards from SANDAG or other sources.

During the eligibility screening process, SANDAG reserves the right to request additional information and/or clarification from any or all applicants, but is not required to do so. Staff also may seek input from a policy advisory committee to determine eligibility, but is not required to do so. Projects that pass the eligibility screening will be scored (see the section entitled "Scoring and Ranking").

Any applicants who have been deemed ineligible or whose projects have been deemed ineligible during the eligibility screening will be notified in writing at the time the determination is made. Applicants may protest the eligibility determination pursuant to the grant program protest procedures (see the section entitled "Protest Procedures").

This CFP does not commit SANDAG to award a grant, defray any costs incurred in the preparation of an application pursuant to this CFP, or to procure or contract for work. SANDAG may reject applications without providing the reason(s) underlying the rejection. Failure to award a grant agreement to applicants will not result in a cause of action against SANDAG.

B. Scoring, Ranking, and Awarding of Funds

Eligible projects will be scored using qualitative and quantitative criteria approved by the SANDAG Board of Directors. Definitions of qualitative and quantitative criteria are provided below.

1. Qualitative/Subjective Scoring

Qualitative or subjective criteria are those criteria in which discretion is needed to provide a score. Often qualitative criteria seek to evaluate how well an applicant responded to an application question or how well the proposed project will achieve a stated goal.

An external evaluation panel will score a proposed project based on qualitative criteria. Evaluation panel members typically consists of 3-5 members of the public that have a strong familiarity with the San Diego region and the grant program goals and

objectives. To avoid conflicts of interest, all evaluation panel members will be screened to be sure they do not have an affiliation with any of the applicants or proposed projects.

2. Quantitative/Objective Scoring

Quantitative or objective criteria are those criteria that a formula or conditional statement is used to provide a score. Often quantitative criteria seek to evaluate a project-related data point or metric against a range or scale and assign a point value based on where the data point or metric falls within the range or scale. Other quantitative criteria assign a point value based on responses to a conditional statement such as a yes/no question or the presence or absence of a condition.

SANDAG staff will score a proposed project based on quantitative criteria. Points associated with quantitative criteria undergo a quality assurance/quality control (QA/QC) review to ensure data used in the quantitative scoring process are accurate and points are awarded appropriately.

3. Ranking and Funding Recommendations

An application's quantitative score will be added to the scores it received from each evaluation panelist (evaluator), forming a total score from each evaluator.

Funding recommendations will be based on project rankings, using a "Sum of Ranks" approach. For each evaluation panel member, the total scores for all projects will be ranked. For example, the project an evaluation panel member scores the highest will rank number one; the second-highest scoring project will rank number two; and so on. Then the rankings an application receives from each evaluation panel member will be summed to produce an overall project ranking (sum of ranks). Projects with the lowest overall sum of ranks will be considered to have performed the best.

The ranked project list will be used to recommend funding allocations in order of rank. Projects will be recommended for funding in descending rank order until funding is exhausted.

As previously stated, partial awards may be recommended. See the section entitled "Partial Awards".

4. Minimum Average Score

To ensure grant funds support quality projects, a project must receive an average score that is equal to or exceeds 50 points to be eligible to receive funding.

5. Tiebreakers

In the event that two or more projects receive the same overall ranking, the following criteria, in descending order, will be used as tiebreakers:

- Highest score on the prohousing policy implementation question
- Highest score on the furthering Regional Mobility Hub Implementation Strategy question
- Highest score on the housing equity question

6. Social Equity Analysis

Prior to award of funding, SANDAG will conduct a social equity analysis to determine whether the funding recommendations, if approved, will result in an equitable distribution of funding and benefits resulting from the funded projects between low-income and minority areas of the region and non-low-income and non-minority areas.

7. Awards and Funding Contingency List

Funding recommendations from the evaluation panel will be presented to the relevant policy advisory committee for recommendation to the Board of Directors. The Board of Directors will consider the funding recommendations and approve awards.

SANDAG will provide a Notice of Intent to Award to all applicants that will contain the projects recommended for funding. The Notice will be sent when the agenda is posted for the policy advisory committee meeting in which the funding recommendations will be presented. See the Timeline for the anticipated Notice of Intent to Award date.

When considering the funding recommendations, the Board of Directors also is asked to authorize staff to offer funding to the next highest ranked project(s) on the ranked project list if a selected project is unable to use its awarded funds or more funding becomes available. This contingency list is usually available until the next CFP is issued, but in some cases may be sooner.

C. Protests

SANDAG grant program protest procedures may be obtained online at sandag.org/contracts.

D. Grant Agreement Execution

If awarded funds, the lead applicant will enter into a grant agreement with SANDAG for the approved project scope of services and become a “grantee.” A sample grant agreement is included in the CFP.

Applicants are encouraged to review the sample grant agreement within their organization prior to submitting an application. Aside from any potential errors or omissions, the terms of the grant agreement will be in substantially the same form as those in the sample grant agreement and are non-negotiable. Failure to sign and return the grant agreement within 45 days of receiving the grant agreement from SANDAG may result in revocation of the grant award. See the section entitled “SANDAG Board Policy No. 035.”

A grant agreement will not be executed until all certificates of insurance and any other necessary forms are received and deemed in compliance with the requirements of the grant agreement.

SANDAG will not reimburse the grantee for costs incurred prior to the executed grant agreement or the Notice to Proceed.

IX. Evaluation Criteria

Projects will be scored based on how well the applicant responses meet the criteria below. All criteria are Quantitative. See the sections entitled “Quantitative Scoring and Qualitative Scoring” for more details.

No.	CRITERIA	POINTS POSSIBLE
1.	RELATIONSHIP TO REGIONAL TRANSIT	
A.	Project area includes or is within 0.5 miles of an existing or planned Rapid and/or rail stop (10 points) OR	10
B.	Project includes or is within 0.5 miles of an existing or planned major transit stop (non-Rapid/non-Rail projects) (5 points)	
2.	FURTHERING REGIONAL MOBILITY HUB IMPLEMENTATION STRATEGY	
A.	Project implements a land use strategy that facilitates VMT reduction and includes zoning for a higher density of housing than is currently allowed and/or improves jobs-housing balance.	10
B.	Project proposes housing policies, Prohousing activities, and/or plans for transportation/mobility improvements to better connect housing to the existing/planned regional transportation network.	10
3.	PROHOUSING POLICY IMPLEMENTATION	
A.	Favorable Zoning and Land Use	20
B.	Acceleration of Housing Production Timeframes	
C.	Reduction of Construction and Development Costs	
D.	Providing Financial Subsidies	
4.	HOUSING EQUITY	
	Planning activities that advance housing equity	20
5.	PARTNERSHIPS	
	Interjurisdictional Prohousing partnership	5
	Community-based organization partnership	5
6.	SUSTAINABILITY	
A.	Project is in a climate resilient area (areas with lower risk of fires, flooding, and impacts of sea level rise) OR includes plans to minimize the impacts of climate change.	5
B.	Project includes measures to reduce greenhouse gas emissions and implement a jurisdiction’s Climate Action Plan	5
7.	MATCHING FUNDS	
	Projects will be awarded points based on evidence of matching funds	10
	TOTAL	100

X. Scoring Rubric

The Rubric is a guide for SANDAG staff and the Evaluation Panel to assist with awarding points based on the Evaluation Criteria.

1. RELATIONSHIP TO REGIONAL TRANSIT (10 POINTS POSSIBLE)

- A. Project area includes or is within 0.5 miles of an existing or planned Rapid and/or rail stop, as defined in the adopted [6th Cycle Regional Housing Needs Assessment \(RHNA\) plan](#) and shown in Figure 4.2 on page 19 of that document. **10 points**

OR

- B. Project includes or is within 0.5 miles of an existing or planned major transit stop (non-Rapid/non-Rail projects), as defined in the adopted [6th Cycle RHNA plan](#) and shown in Figure 4.2 on page 19 of that document. **5 points**

2. FURTHER PLANNING TO SUPPORT REGIONAL MOBILITY HUB IMPLEMENTATION STRATEGY (20 POINTS POSSIBLE)

Up to 20 points may be awarded to programs that further planning to support the Regional Mobility Hub Implementation Strategy in San Diego Forward: the 2019 Federal Regional Transportation Plan. Ten points will be awarded in two separate categories as shown below:

- A. Category 1: Land Use Strategies That Facilitate VMT Reduction

Project implements a land use strategy that facilitates VMT reduction and includes zoning for a higher density of housing than is currently allowed and/or improves jobs-housing balance. **10 points**

- B. Category 2: Projects that Connect Housing with Transportation

Project proposes housing policies, Prohousing activities, and/or plans for transportation/mobility improvements to better connect housing to the existing/planned regional transportation network. **10 points**

3. PROHOUSING POLICY IMPLEMENTATION (20 POINTS POSSIBLE)

The California Department of Housing and Community Development (HCD) has developed [Prohousing regulations](#). These regulations guide how HCD prioritizes localities that have implemented certain housing policies for state housing funding. One goal of SANDAG's Housing Acceleration Program is to create incentives for localities in the region to achieve the Prohousing designation. Prohousing activities are grouped into four categories.

Applicants will be awarded 5 or 10 points, as indicated below, for each Prohousing activity up to **20 points cumulative** for all categories. Applicants may choose to implement multiple Prohousing policies in a single category or in multiple categories.

A. Category 1: Favorable Zoning and Land Use

Activities worth 10 points each:

- Program would implement housing element plan for zoned capacity of >150% of RHNA
- Permitting missing middle uses (e.g., duplexes, triplexes, fourplexes, townhomes) in existing low-density single-family zones
- Eliminating minimum parking requirements
- Allowing residential in commercial zones

Activities worth 5 points each:

- Allowing more/larger accessory dwelling units (ADUs) than state law requires
- Density bonus that is >10% more than state requirements
- Establishment of Workforce Housing Opportunity Zone (WHZO) or housing sustainability district
- Modify development standards to promote more density
- Program would implement housing element plan for zoned capacity of >125% of RHNA
- Reducing parking requirements

B. Category 2: Acceleration of Housing Production Timeframes

Activities worth 10 points each:

- Ministerial approval of housing
- Streamlined/program level California Environmental Quality Act (CEQA) Environmental Impact Report (EIR) for general plans/specific plans etc.
- Establishing permit process that is less than 2 months
- Elimination of public hearings for projects consistent with zoning/general plan
- One stop shop permitting processes or single point of contact
- Priority permit processing or reduced plan check times for ADUs/junior ADUs, multifamily, or affordable housing

Activities worth 5 points each:

- Streamlining housing development at project level
- Establishing permit process that is less than 4 months
- Limitation to 3 public hearings for projects consistent with zoning/general plan
- Eliminate or replace subjective design standards with objective standards that simplify zoning
- Standard entitlement application
- Publicly posting online status updates on permit approvals

C. Category 3: Reduction of Construction and Development Costs

Activities worth 10 points each:

- Waive development impact fees for housing
- Adoption of universal design ordinances
- Preapproved prototype plans for missing middle housing (e.g., duplexes, triplexes, fourplexes, townhomes)

Activities worth 5 points each:

- Measures that reduce costs for transportation related infrastructure or that encourage active transit or other alternatives to cars

- Reduce development impact fees for housing
- Less restrictive ADU standards than state requirements
- Fee reduction including deferrals or reduced fees for housing with people with special needs
- Promoting innovative housing types that reduce development costs

D. Category 4: Providing Financial Subsidies

Activities worth 10 points each:

- Establishment of local housing trust fund or collaboration on regional fund
- Program to comply with Surplus Lands Act and make publicly owned land available for affordable housing
- Establish Enhanced Infrastructure Financing District (EIFD)
- Prioritization of local general funds for affordable housing

Activities worth 5 points each:

- Grants/low interest loans for affordable ADUs
- Direct residual redevelopment funds to affordable housing
- Development and regular use of housing subsidy pool, local/regional trust, or similar funding source

4. HOUSING EQUITY (20 POINTS POSSIBLE)

In February 2021, the SANDAG Board of Directors adopted the following statement of Commitment to Equity.

Our Commitment to Equity

We hold ourselves accountable to the communities we serve. We acknowledge we have much to learn and much to change; and we firmly uphold equity and inclusion for every person in the San Diego region. This includes historically underserved, systemically marginalized groups impacted by actions and inactions at all levels of our government and society. We have an obligation to eliminate disparities and ensure that safe, healthy, accessible, and inclusive opportunities are available to everyone.

In accordance with SANDAG’s Commitment to Equity, applicants will receive five or ten points, as indicated below, for each planning activity that advances housing equity. Applicants may choose to implement multiple activities in each point category. Five or ten points will be awarded for every checked box, **up to 20 points maximum**.

Activities worth 10 points each:

- Establishment of rent stabilization
- Establishment of anti-displacement policies in conjunction with transit improvements
- Creation of a strategy or fund to preserve naturally occurring affordable housing
- Creation of tenant protection policies such as access to counsel, just cause eviction policy, etc.
- Rezoning and other policies that result in a net gain of low- and moderate-income housing while concurrently mitigating development impacts on or from environmentally sensitive or hazardous areas.
- Programs, land use plans and new policies (other than those indicated in Section 3, above) that are intended to result in increased investment (such as infrastructure, housing, open space, etc.) in lower opportunity areas. Such areas include, but are not limited to, Low Resource and High Segregation & Poverty areas designated in the 2021

[California Tax Credit Allocation Committee \(CTCAC\)/HCD Opportunity Maps, and disadvantaged communities pursuant to California Senate Bill 535 \(2012\).](#)

- Zone changes or other policies (other than those listed above) that increase low- and moderate-income housing and affordability in High Resource and Highest Resource areas, as designated in the [2021 CTCAC/HCD Opportunity Maps](#).

Activities worth 5 points each:

- Displacement risk studies
- Creating a publicly available database of affordable housing properties at risk of losing affordability restrictions through expiration of rent restrictions or tenant voucher programs
- Proactive monitoring housing at risk of losing affordability restrictions and proactive enforcement of state mandated tenant notification provisions

5. PARTNERSHIPS (10 POINTS POSSIBLE)

To leverage resources and create consistency across the region, SANDAG is encouraging jurisdictions to partner to share information, plan, and adopt policies together. Additionally, SANDAG encourages jurisdictions to partner with CBO or nonprofit to ensure the benefits of Prohousing activities are realized by a broad population and in an equitable manner. Partnerships must be evidenced by a letter of support.

- Interjurisdictional Prohousing partnership letter provided **5 points**
- CBO partnership or other non-profit organization letter provided **5 points**

6. SUSTAINABILITY (10 POINTS POSSIBLE)

Is this project in a climate resilient area (areas with lower risk of fires, flooding, and impacts of sea level rise) OR does the project include plans to minimize the impacts of climate change? **5 points**

Does the project include measures to reduce greenhouse gas emissions and implement a jurisdiction’s Climate Action Plan? **5 points**

7. MATCHING FUNDS (10 POINTS POSSIBLE)

Projects will be awarded points based on evidence of matching funds. Only funds with evidence of enforceable commitments will be considered matching funds.

MATCH PERCENTAGE	POINTS
0%	0
0.01-9.99%	2
10.00-19.99%	4
20.00-29.99%	6
30.00-39.99%	8
40% or more	10

*Match percentage is calculated by dividing the matching funds committed to the project with the total project cost and multiplying by 100.