

# Massachusetts Housing Partnership

## Request for Qualifications - ADU Incentive Program

January 27, 2026

### **1. BACKGROUND & OBJECTIVES**

The Massachusetts Housing Partnership Fund Board (MHP) seeks qualified third-party Feasibility Study Providers (FSPs) to assist residential property owners in evaluating the feasibility of constructing an Accessory Dwelling Unit (ADU) on their property. This Request for Qualifications (RFQ) invites respondents to submit professional qualifications to be included on a pre-qualified list of approved FSPs. The goal of the feasibility studies is to provide property owners with a clear understanding of project scope, estimated cost, and feasibility, considering site constraints, zoning requirements, and budget.

As the administrator of the ADU Incentive Program, and in collaboration with the State's Executive Office of Housing and Livable Communities (EOHLC), MHP intends to further incentivize and spur the development of ADUs across the state of Massachusetts.

### **2. SCOPE AND REQUIREMENTS**

FSPs will be responsible for delivering comprehensive feasibility studies for property owners with the goal of helping the property owner understand the different considerations they will need to account for should they decide to move forward with their ADU build.

Selected FSPs will provide MHP with information pertaining to each feasibility study and in return receive \$300 for each complete and approved study (and an additional \$200 should that study lead to a permitted ADU build). FSPs will use an online system (designed and implemented by MHP) to submit details pertaining to each study. The services to be provided will include, at a minimum, the following components:

#### **A. Initial Engagement**

- Schedule and conduct virtual, phone and/or in-person consultations with property owners to gather preliminary information
- Arrange and perform on-site visits to assess physical conditions

#### **B. Feasibility Study Components**

- **Site Assessment:** Evaluate lot size, topography, existing structures, and environmental considerations
- **Site Access & Clearing Needs:** Identify access points for construction and any clearing or grading requirements

- **Zoning Review:** Analyze local zoning ordinances, setbacks, height restrictions, and other regulatory constraints
- **Utility Assessment:**
  - Water and sewer connection feasibility
  - Energy needs and potential upgrades
- **Preliminary Design Considerations:** Provide conceptual layout options and identify design limitations
- **Budget & Cost Feasibility Analysis:** Estimate construction costs and assess alignment with the property owner's budget

### **C. Documentation and Reporting**

- Enter all required data and findings into MHP's online application
- Upload supporting documentation (e.g., site photos, sketches, zoning notes)
- Ensure completeness, accuracy and clarity of all submissions

### **D. Workflow and Quality Assurance**

- MHP will review for:
  - Form completeness
  - Quality and clarity of analysis
  - Compliance with program requirements
- MHP may request clarifications, additional documentation, or revisions before approval

### **E. Performance Requirements & Compensation**

- FSPs will be expected to complete a minimum of fifty (50) Feasibility Studies per year
- MHP will pay the provider \$300 for each feasibility study approved by MHP
- FSPs can elect to charge the homeowner up to an additional \$300 for the study, for a total of \$600 in compensation to the FSP for each approved study. FSPs must disclose the fee that they intend to charge homeowners to MHP in advance, and the amount of the fee will be disclosed on the approved list of FSPs that is sent to interested property owners.
- MHP will pay an additional \$200 to the FSP if an approved study leads to a building permit being issued for an ADU by June 30, 2028. This additional payment will be subject to conditions and limitations that will be outlined in the contracts with selected FSPs.
- Payments will be aggregated and issued monthly

#### **F. Deliverables for Each Feasibility Study Conducted**

- Completed Feasibility Study submitted via online system
- Supporting documentation uploaded to the online system
- Timely response (within two (2) business days) to MHP requests for clarification or revisions

#### **G. Qualifications**

- Demonstrated experience in residential site assessment, zoning analysis, and cost estimation
- Ability to conduct virtual and in-person consultations.
- Working knowledge and understanding of ADU design principles and Massachusetts building and zoning codes
- Working knowledge and understanding of the Massachusetts ADU law, 760 CMR 71.00: Protected Use Accessory Dwelling Units Regulations
- Proficiency in using online applications or similar online forms

### **3. VENDOR RESPONSE FORMAT**

Respondents must submit a complete proposal that includes the following components:

#### **A. Cover Letter**

- Brief introduction of the firm or individual
- Statement of interest in participating as a FSP for the ADU Incentive Program
- Contact information for the primary point of contact, including name, title, phone number and email address
- Summary of relevant qualifications and experience
- Respondent's understanding of the ADU Incentive Program goals and how the firm or individual's services align with them

#### **B. Qualifications and Experience**

- Detailed description of relevant experience, including:
  - Residential site assessments
  - Zoning and permitting analysis
  - Cost estimation and budgeting for residential construction
- Demonstrated familiarity with Massachusetts and local building and zoning laws and codes, including ADU-specific provisions

- Experience conducting virtual consultations and on-site evaluations, specifying tools or platforms used
- Examples of prior work related to ADUs or similar small-scale residential projects (include project summaries)

### **C. Staffing and Capacity**

- Identification of key personnel who will perform the services
- Summary of qualifications for each team member
- Statement confirming company's ability to complete a minimum of fifty (50) Feasibility Studies per year, including a description of staffing, workflow, and resources to support this capacity

### **D. Technical Approach**

- Outline of the proposed plan for how you would:
  - Conduct virtual and phone consultations and in-person on-site visits
  - Conduct feasibility assessments (site, zoning, utilities, design, cost)
- Description of how and when findings will be documented and subsequently submitted via MHP's web-based online system via standardized form template (would you plan to complete and submit them in the field? From the office? Day of? Week of? Etc.
  - Note – FSPs may complete and package their feasibility study in any form they see fit as long as they're able to complete MHP's standardized form template within the web-based online system and upload associated documentation.
- Commitment to Timelines and Quality:
  - Describe your approach to ensuring accuracy, clarity, and compliance with program requirements.

### **E. Technology and Data Management**

- Agreement to comply with program requirements, data privacy and security standards, and MHP's request/response timelines for clarifications, corrections, and revisions

### **F. References**

- Provide at least three (3) professional references from clients for similar work completed within the past three (3) years. Each reference should include:
  - Client name and organization
  - Project name and brief description
  - Services provided

- Project completion date
- Contact person's name, title, phone number and email address

#### **G. Terminated Contracts**

- Provide a list of all contracts that were terminated within the past three (3) years, and include a summary outlining the reason for each termination. If no contracts were terminated during this period, indicate this in your response.

#### **H. Debarment Disclosure Statement**

Respondents must certify to the best of their knowledge that the company and its principals:

- a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal or Massachusetts state department or agency;
- b. Have not within the past three (3) years been convicted of, or had a civil judgment rendered against them from commission of fraud, or a criminal offense in connection with obtaining or attempting to obtain, or performing a public (federal, state or local) transaction or grant under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property; are not presently indicted for or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offences listed above; and
- c. Have not within the past three (3) years had one or more public transactions (federal, state, or local) terminated for cause or default.

#### **I. Pricing and Payment**

- Acknowledgement of the payment structure:
  - \$300 per completed and approved feasibility study, paid monthly; and
  - Additional \$200 should any completed and approved feasibility study lead to a permitted ADU build - Subject to conditions and limitations that will be outlined in contracts with selected FSPs.
    - Note – FSPs are allowed to charge an additional fee to the property owner for the service of providing the feasibility study, however, the amount charged to the homeowner cannot exceed 50% of the total cost (i.e. \$300 would be the maximum amount charged to the homeowner).

#### **J. Required Certifications and Insurance**

- Proof of any professional licenses (i.e., Construction Supervisor's License (CSL) and/or Home Improvement Contractor (HIC), etc.).
- Evidence of current liability insurance coverage.

#### **4. SUBMISSION FORMAT AND TIMELINE**

- a. Priority given to proposals submitted by the initial deadline of **February 24, 2026**. However, applications will be reviewed on a rolling basis through June 30, 2026 at 5:00 PM EST.
- b. Questions received by February 9, 2026, will be answered by February 13, 2026. Subsequent questions will be answered and posted on a rolling basis on MHP's website and COMMBUYS.
- c. Proposals must be submitted electronically in PDF format and include all required sections in the order listed above.
- d. Initial Submission deadline: February 24, 2026
- e. Email proposals to: [eschmiedl@mhp.net](mailto:eschmiedl@mhp.net) and [dlewinter@mhp.net](mailto:dlewinter@mhp.net) with the subject line "ADU Incentive Program RFQ Response"

The following timeline represents the tentative schedule of the entire RFQ process. The dates listed below are subject to change. Respondents are responsible for monitoring the RFQ for any changes prior to the submission deadline. Responses will be accepted on a rolling basis until such time as this RFQ closes on June 30, 2026 at 5:00 PM EST. MHP reserves the right to suspend the review of additional submissions or close the RFQ if it deems that the number of contracts awarded at that point adequately meets its needs. Once the response is submitted, it will be considered final.

##### **Anticipated RFQ Timeline**

RFQ Issued:	January 27, 2026
Respondent Questions Due:	February 9, 2026
Answers to Questions Posted:	February 13, 2026
Initial Submission Deadline:	February 24, 2026
Initial Responses Reviewed:	March 6, 2026
Initial Vendor Selection:	March 20, 2026
Rolling Submissions Reviewed:	Through June 30, 2026, 5:00 PM EST

#### **5. EVALUATION CRITERIA AND WEIGHTS**

Proposals must include all mandatory items listed below to advance to scoring. Any proposals failing to do so may be rejected without further review. MHP may allow corrections

or clarifications to a submitted response. Only correction of minor informalities, such as clerical errors or insignificant mistakes that can be corrected without unfairly prejudicing other Respondents' responses will be allowed. Clarifications are allowed to explain what is stated in the response.

**A. Mandatory (Pass/Fail) Items:**

- Proposal submitted by the deadline, in the required format (PDF) and in the order required in Section 3 of this RFQ.
- Cover letter identifying the information required in Section 3 of this RFQ.
- Confirmation and acknowledgment of payment terms: \$300 per completed and approved Feasibility Study, paid monthly, and an additional \$200 per completed and approved Feasibility Study that leads to a permitted ADU build.
- Confirmation of capacity to complete at least fifty (50) Feasibility Studies per year.
- Proof of required professional licenses and current liability insurance.
- Ability and commitment to use MHP's online application to submit studies and documentation.
- Agreement to comply with ADU Incentive Program requirements, data privacy and security standards, and MHP's request/response timelines for clarifications, corrections, and revisions.

**B. Scored Criteria (100 Points Total)**

**Qualifications and Relevant Experience – 20 points**

Demonstrated experience with residential site assessments, zoning and permitting analyses, utility/energy assessments, preliminary design considerations, and construction cost estimation – particularly for ADUs or small-scale residential projects in Massachusetts. Clear familiarity with Massachusetts building codes and local zoning requirements.

**Technical Approach and Methodology – 20 points**

A clear, practical, thorough methodology for conducting virtual consultations, in-person site visits, and comprehensive feasibility analyses across all required components: site conditions, access and clearing, zoning and setback compliance, water and sewer, energy needs, preliminary design options, and budget/cost feasibility. The methodology should include defined workflows, templates or checklists, and quality assurance steps to ensure accuracy and consistency.

**Capacity and Staffing Plan – 15 points**

A staffing plan that demonstrates the ability to complete at least fifty (50) feasibility studies per year, including staffing levels, key roles and resumes, workload allocation, coverage plan, and scheduling strategy. The staffing plan should include

how you plan to manage periods of increased demand, ensure geographic coverage, and maintain continuity (e.g., vacations, turnover).

**Quality Assurance (QA) and Timeliness – 10 points**

Defined QA processes (peer review, standardized deliverables), target timelines (e.g., from intake to site visit to submission), and a description of the plan to ensure prompt responses to MHP's requests for clarification or revisions.

**System Use and Data Management – 10 points**

Demonstrated proficiency with web-based online systems (or similar CRM), including clear processes for accurate data entry, document management, and version control.

**Massachusetts Zoning and Local Context Knowledge – 10 points**

Demonstrated understanding of Massachusetts municipal variation (setbacks, overlays, wetlands, conservation, historic districts), permitting pathways, and coordination with local officialsinspectors.

**References and Past Performance – 10 points**

Quality and relevance of at least three (3) professional references; evidence of successful delivery on similar project scopes (quality, clarity of analysis, timeliness, professionalism).

**Value-Add and Equity Considerations – 5 points**

Additional benefits such as multilingual capacity, homeowner education materials, sample conceptual sketches, energy efficiency expertise, accessibility/Universal Design considerations, and strategies to serve diverse communities statewide.

**C. Scoring Guidance/Rubric**

Each criterion will be scored on a 0-5 scale, then multiplied by the criterion's weighted percentage.

- **5 – Excellent:** Exceeds requirements; provides detailed, convincing evidence; demonstrates strong Massachusetts/ADU expertise.
- **4 – Strong:** Meets requirements well; minor gaps; good evidence of success.
- **3 – Adequate:** Meets requirements satisfactorily with generally sufficient detail; some areas may require clarification or strengthening; moderate risk to schedule/quality.
- **2 – Weak:** Partially meets requirements; lacks detail and key elements; high risk to schedule/quality.
- **1 – Poor:** Does not substantively meet requirements; insufficient evidence and details provided.

- **0 – Not Addressed:** No response or non-responsive.

#### **D. Minimum Score Threshold and Award**

Proposals must achieve  $\geq 3.5/5$  on the scored criteria to be considered for award.

MHP may award any number of contracts and reserves the right to:

- Modify scope of work or clarify program requirements post-selection, as MHP has determined in its sole discretion is appropriate to meet program needs or initiatives
- Make awards by geographic coverage, capacity, or other criteria MHP has determined in its sole discretion is appropriate to meet program needs or initiatives
- No award if proposals do not meet program needs

#### **E. Documentation to Support Evaluation**

Respondents are encouraged to include:

- **Sample feasibility study** (redacted) illustrating site findings, zoning/setbacks analysis, preliminary design considerations, and cost feasibility with assumptions.
- **Project schedule template** (intake  $\rightarrow$  consult  $\rightarrow$  site visit  $\rightarrow$  draft  $\rightarrow$  submission  $\rightarrow$  revision).

### **6. TERMS AND CONDITIONS**

- MHP reserves the right to make any amendments to this RFQ after publication. It is each respondent's responsibility to check for amendments or modifications to this RFQ. MHP also reserves the right to cancel or to reissue this RFQ in whole or in part, prior to execution of a contract.
- MHP will not be liable for any costs incurred by a respondent in preparation of a proposal submitted in response to this RFQ.
- Issuance of this RFQ does not obligate MHP to contract, in whole or in part, for services specified herein.
- MHP reserves the right to, at its sole discretion, to reject any and all proposals received without penalty and not to issue any contract as a result of this RFQ.
- MHP reserves the right to waive minor administrative irregularities or informalities, as MHP may deem in its sole discretion, in a proposal.
- Inclusion of any respondent on the FSP approved list does not guarantee that such respondent will be selected to perform feasibility studies.

- MHP reserves the right to discontinue the FSP approved list at any time.
- Any material misrepresentation made by a respondent or any failure by a respondent to disclose any material information in connection with its response to this RFQ may result in the respondent's disqualification from consideration for inclusion on the FSP approved list, or if the respondent is already on the list, removal of the respondent from the list as well as respondent's disqualification from consideration.
- Each respondent has a continuing obligation, prior to and after placement on the FSP approved list, to update MHP regarding any material changes to information that such respondent provided to MHP within thirty (30) days of any such material changes.

## **7. Q&A AND ADDENDA**

**Addendum A - Draft Feasibility Study Form** (for submission via web-based online system – *subject to change*)

## **8. CONTRACT TERMS**

Contracts may be negotiated with respondents whose proposals would be most advantageous to MHP, all factors considered.

Selected respondents must perform all work diligently, carefully, and in a professional manner. Failure to meet performance standards may result in removal from the approved FSP list and/or termination of the contract.

A contract between selected respondents and MHP shall include MHP's contract, this RFQ, the respondent's response to the RFQ, and any other documents mutually agreed upon.

## Addendum A

### Feasibility Study Form via Web-Based System (*draft*)

#### **Overview**

- Client Name
- Property Address
- ADU Type
  - Detached
  - Attached
  - Basement
  - Attic
  - Over-garage
  - Other
- Estimated Square Feet
  - < 600
  - 600 – 700
  - 700 – 800
  - 800 – 900
  - > 900
- Is the proposed unit a Protected Use ADU? (*an ADU that is the smaller of 1) 900 sq ft. OR 2) not larger than half of the gross floor area of the principal dwelling*)
  - Yes
  - No
    - If No, please describe
- Project Complexity
  - Low
  - Medium
  - High
    - Project Complexity Notes:
- Estimated Timeline
  - < 6 months
  - 6-9 months
  - 9-12 months
  - > 12 months
    - Timeline Notes:

#### **Permitting**

- Will the project require any non-typical permits?
  - Yes
    - If yes, please describe
  - No
- Does the municipality have any additional ADU-specific rules?
  - Yes
    - If Yes, please describe

- If Yes, are any of these additional rules unreasonable?
  - No
- Does the municipality have any dimensional, historical, infrastructure, parking, etc., requirements that may limit the desired build?
  - Yes
    - If yes, please describe
  - No

## **Electrical**

- Current electrical service type
  - Overhead
  - Underground
  - Other
- Current electrical service amperage:
- Proposed electrical service notes:

## **Wastewater**

- Current system
  - Sewer
  - Septic
- Proposed system
  - Sewer
  - Septic
  - Proposed wastewater system notes:

## **Water Service**

- Current system
  - Public
  - Private
- Proposed system
  - Public
  - Private
  - Proposed water service system notes:

## **Site Work**

- Site work and site preparation needs
  - Low
  - Medium
  - High
  - Site work notes:

## **Site Access**

- Site access complexity
  - Low
  - Medium
  - High
  - Site access notes:

## **Environmental**

- Are there any environmental considerations that will require mitigation?
  - o Yes
    - If yes, please describe
  - o No

## **Budget**

- Property Owner's Target Budget
  - o <\$100,000
  - o \$100,000 - \$150,000
  - o \$150,000 - \$200,000
  - o \$200,000 - \$250,000
  - o \$250,000 - \$300,000
  - o \$300,000 - \$350,000
  - o \$350,000 - \$400,000
  - o > \$400,000
- Proposed Estimated Cost
  - o <\$100,000
  - o \$100,000 - \$150,000
  - o \$150,000 - \$200,000
  - o \$200,000 - \$250,000
  - o \$250,000 - \$300,000
  - o \$300,000 - \$350,000
  - o \$350,000 - \$400,000
  - o > \$400,000
- Is the property owner's target budget a reasonable expectation?
  - o Yes
  - o No
    - If No, please describe