

REQUEST FOR PROPOSALS (RFP)

PROFESSIONAL CONSULTING SERVICES
REGIONAL HOUSING NEEDS ASSESSMENT
FREMONT COUNTY / WESTERN GREATER YELLOWSTONE CONSORTIUM
BUILDING SUSTAINABLE COMMUNITIES

On behalf of the Western Greater Yellowstone Consortium (WGYC), Fremont County is hereby soliciting proposals from qualified firms interested in providing the professional housing needs assessment services described in this RFP.

- Proposal Due Date: **February 7, 2014**
- No. of Copies: One (1) original plus one (1) electronic copy in PDF format on a CD / detachable drive.
- Submit to: Fremont County Planning and Zoning
Attention: Tom Cluff
125 N. Bridge Street
St. Anthony, ID 83445
- Fremont Co. Contact: Tom Cluff
(208) 624-4643
E-mail questions to tcluff@co.fremont.id.us
- Primary Consortium Contact: Christine Walker
Executive Director
Teton County Housing Authority
(307) 732-0867
E-mail questions to cwalker@tetonwyo.org

SUMMARY

This Request for Proposals (RFP) seeks proposals for development of a Regional Housing Needs Assessment that will provide a basis for developing regional housing objectives and strategies that will be part of the 4-county Regional Plan for Sustainable Development (RPSD).

The Western Greater Yellowstone Consortium (WGYC) has been awarded a Sustainable Communities Regional Planning Grant to support regional planning efforts that integrate housing, land-use, economic and workforce development, transportation, and infrastructure developments in a manner that empowers regions to develop sustainable economies. This study effort will engage stakeholders in understanding current conditions, establishing regional priorities and objectives, and establishing strategies to meet those objectives.

REGIONAL HOUSING NEEDS ASSESSMENT

Housing availability and need varies throughout in the Greater Yellowstone region. In some communities land values far exceed what is affordable to wage earners in the community; while in other communities there is an abundance of land and housing for sale that far exceeds the employment opportunities. Some communities are just beginning to understand their housing needs, while other communities are seeking a better understanding of their housing relationship with their neighbors. This comprehensive analysis of housing needs in the four-county region will:

1. Establish affordability bands for each community in the region relative to the actual household incomes for the community
2. Evaluate the cost burden of housing (including transportation costs), housing availability, and housing needs in each affordability band, and
3. Create and evaluate a number of alternative housing strategies for review by the consortium.

BACKGROUND

The Western Greater Yellowstone Consortium (WGYC) supports metropolitan and multijurisdictional planning efforts that integrate housing, land use, economic and workforce development, transportation, and infrastructure investments in a manner that empowers jurisdictions to consider the interdependent challenges of: (1) economic competitiveness and revitalization; (2) social equity, inclusion, and access to opportunity; (3) energy use and climate change; and (4) public health and environmental impact. The economic development strategy places a priority on investing in partnerships, including nontraditional partnerships (e.g., arts and culture, recreation, public health, food systems, regional planning agencies and public education entities) that translate the Livability Principles into strategies that direct long-term development and reinvestment, demonstrate a commitment to addressing issues of regional significance, use data to set and monitor progress toward performance goals, and engage stakeholders and residents in meaningful decision-making roles.

The WGYC consists of the following entities

Counties:

Fremont, Madison, Teton, Idaho and Teton, Wyoming

Cities:

Ashton, Driggs, Island Park, Jackson, Rexburg, St. Anthony, Victor

Nonprofit Organization Partner:

Yellowstone Business Council

Federal and State Agency Partners

US Bureau of Land Management, US Forest Service, Idaho Department of State Lands

Funding Agency:

U.S. Department of Housing and Urban Development

Study elements will provide the WGYC the information needed to meet the HUD objectives for the study and for local municipalities to meet comprehensive planning requirements set by the state and goals and policies established locally.

The final deliverable from the overall grant will be a Western Greater Yellowstone Regional Plan for Sustainable Development (RPSD) which will include the Greater Yellowstone Framework for Sustainable Development, a four-county Comprehensive Resource Plan and Sustainability Strategy, and a model development code for use by cities and counties. The RPSD will be developed by the WGYC utilizing the reports, findings, and recommendations from all the focus area studies.

LIVABILITY PRINCIPLES

When developing region-specific objectives and the associated strategies and work plans within each of the study focus areas, it is imperative that these efforts are consistent with the Sustainability Partnership's Livability Principles which are:

- Transportation Choices
- Supporting Existing Communities
- Equitable, Affordable Housing
- Coordinating and Leveraging Federal Policies and Investment
- Economic competitiveness
- Value communities and neighborhoods

INFORMATION AVAILABLE FOR CONSULTANT

Proposal submittal information and other information regarding the grant program and studies is available at <http://sustainableyellowstone.org/>

REGIONAL HOUSING NEEDS ASSESSMENT - SCOPE OF WORK

Proposals should demonstrate how the following required components of the Regional Housing Needs Assessment will be completed (and the budget for each) incorporating at least the amount of public participation described below.

Budget Allocation

Please submit proposed budget for the provision of the required components and public participation deliverables listed, inclusive of all labor, travel and overhead costs.

Required Components

- A. Affordability Bands – Determine actual household income for each community (for occupants, including renters) in order to establish affordability bands. Compare actual household income to Median Family Income (typical benchmark used that isn't necessarily reflective of actual).
- B. Housing Inventory – Utilizing surveys, key stakeholder interviews and existing data, aggregate data in the following categories by affordability band to create a housing inventory for each community. Categories of interest:
 - Cost of housing
 - Ownership or rental occupancy of the housing unit
 - Tenure in current housing unit and expected stay
 - Distance from and mode of travel to work/services/recreation
 - Desired location (where the resident would like to live)
 - Housing unit type
 - Housing unit condition
 - Suitability of housing type
 - Other issues identified by the advisory group
- C. Housing Affordability - Review housing inventory throughout the region and taking into consideration housing and transportation costs evaluate the available affordable housing for each affordability band.
- D. Housing Needs – Utilizing information compiled in A – C, determine housing units needed in each affordability band suitable to the occupant and in the desired location to meet livability principles as stated above.

- E. Recommended Actions – Recommendation of specific types of solutions for the different challenges faced by each community.

Public Participation

Participation of the public, especially those members of the public that are often underrepresented in planning processes, is a key element of the execution of all components of the grant. The following public participation plan is the minimum level of public participation expected in the development of the Housing Needs Assessment. Describe any modifications or additional public outreach you would propose.

1. Work with advisory team to identify issues and delivery mechanisms.
2. A survey (paper and web format) based on the issues identified will be distributed to the public.
3. Summary of data in order to establish housing objectives and alternative strategies regionally
4. Remain available to WGYC, housing advisory team and HUD staff throughout the public comment process as well as the review process

Given a regional approach is pioneering, special consideration is needed and it is important contractor understands what is expected. Selected contractor will become familiar with the documents on Fair Housing and Equity Assessment (FHEA) and Regional Analysis of Impediments (RAI) on the HUD [home page](#); the OSHC FHEA and RAI webinars available on the Sustainable Communities Learning Network (selected consultant can gain access through the WGYC – by contacting Jeri Mintzer jmintzer@sclearningnetwork.org) and the detailed comments the regional Fair Housing staff provided to the WGYC on the initial RAI. For example, issues related to historic barriers to fair housing and impediments to opportunity should to be included as well as specific recommended actions to overcome such impediments.

DELIVERABLES:

- Household Survey – Working with the advisory group, a survey to collect data needed to produce affordability bands for communities in the region, on each identified issue will be developed. Advisory group will review questions prior to survey activity.
- Household Survey result analysis and presentation – Upon completion of the surveys, analysis of the results will be presented to the advisory group to inform drafting of objective and alternative strategies.
- Final Analysis of Impediments, incorporating new data and HUD’s comments on draft Analysis of Impediments that satisfies HUD’s program requirements and supplies the consortium with useful local information.
 - Sometimes, gaps are identified by HUD staff on close to final drafts, which may take additional work by contractor

SCHEDULE

Describe the schedule you would propose to accomplish the work described herein by August 31, 2014, including the availability and present/expected workloads of key team members. Discuss a schedule for addressing additional work required by gaps identified by HUD staff. Discuss a schedule for additional

tasks you would propose that are not addressed in the Required Components specified herein. All work must be completed by August 31, 2014 to incorporate in the final stages of the Regional Plan for Sustainable Development (RPSD) occurring in the fall of 2014.

PROPOSAL REQUIREMENTS

Proposals shall be submitted containing the following information in the order outlined, the format described, and according to the proposal submittal requirements. Proposals not meeting these requirements may be considered non-responsive and rejected.

Information to Be Submitted

1. Cover page (Not included in the page count) with title submitting firm name, key contact, address, phone
2. Qualifications of Consultant Team
 - a. Firm description: history, years in operation, office locations, annual revenue
 - b. Describe specialized experience of team with study focus area
 - c. Experience with local stakeholders and governing agencies associated with the region
 - d. Project Experience: Include summary of maximum of five (5) related projects. For each project list:
 - i. Staff proposed for this project who worked on the project
 - ii. Project scope and consultant fee on project
 - iii. Project client reference; name, phone number, email, and physical address.
 - e. Project Manager
 - i. Description of qualifications
 - ii. Current work load including projects this individual is managing, and the project
 - iii. Size, location, and percent complete.
 - f. Project Team Members
 - i. Description of qualifications
 - ii. Individuals shall be listed with specific project responsibilities and they shall not be removed or replaced without County approval
3. Proposed Budget. The desired budget will be allocated by Required Component, inclusive of all labor, travel, and overhead costs.
4. Proposed Schedule. The desired schedule is submittal of draft report within 4 months of contract award and final report within 1 month after receipt of comments on the draft report. Please provide a proposed schedule. If the proposed schedule does not meet these anticipated deadlines, provide justification.
5. Provide Project Manager and Team Member resumes as an appendix (not in page count). Limit resumes to two pages.
6. Other Proposal Elements in Appendix
 - a. Provide Proof of Insurance, as applicable
 - b. Provide proof of license to conduct business in Idaho and Wyoming

Proposal Format

1. Proposals shall contain the required information discussed above, in the general order listed, not exceeding ten (10) pages in length (not including the Appendix) with all pages standard letter size (8.5x11 inches).
2. Front and back cover pages are not included in the page count
3. Font shall be not smaller than 10 point.

Proposal Submittal

1. Submit proposal to Fremont County by 5:00 p.m. on **Friday February 7, 2014**, to:
Fremont County Planning and Zoning - Attention: Tom Cluff
125 N. Bridge Street, St. Anthony, ID 83445
The County will not consider proposals received after the deadline.
2. Questions pertaining to this request for proposals must be submitted by email and shall be directed to Christine Walker at cwalker@tetonwyo.org. All questions shall be submitted before midnight on **Friday January 17, 2014**. List of questions and answers will be published on the consortium website (www.sustainableyellowstone.org) no later than **Monday January 27, 2014**.

2013 PROPOSAL EVALUATION SCHEDULE

- | | |
|--------------------------------------|----------------------|
| 1. RFP released | January 8, 2014 |
| 2. Question due date | January 17, 2014 |
| 3. Proposal due date | February 7, 2014 |
| 4. Proposal review | February 7-14, 2014 |
| 5. Interviews | February 18-20, 2014 |
| 6. Contract award date | February 28, 2014 |
| 7. Finalize agreement, scope and fee | March 14, 2014 |

PROPOSAL SELECTION

The successful consultant selected based on qualifications and in accordance with County procurement policy. The Consortium reserves the right to complete oral interviews after proposal evaluation. Proposals will be ranked according to the following submittal sections and associated weight.

1. Qualifications of the Consultant Team (40%)
 - a. Experience and Understanding of Project Issues (15%)
 - b. Experience and Understanding of Local Conditions and Issues (15%)
 - c. Experience, Qualifications and Availability of Project Management (10%)
2. Approach and Methodology (40%)
3. Proposed budget (10%)
4. Proposed Schedule (5%)
5. Firm responsiveness / compliance with RFP / quality of presentation (5%)

Final contract fees will be negotiated. If the Owner and consultant cannot successfully negotiate a contract, the Owner will enter negotiations with next highest ranked consultant.

ADDITIONAL INFORMATION

1. The issuance of this RFP does not constitute an assurance by Fremont County that any contract will actually be entered into by the County and Consortium, and expressly reserves the right to:
 - a. Delay or deny approval of the work if in Consortium’s best interest
 - b. Waive any immaterial defect or informality in any response or response procedure
 - c. Reject any and all proposals
 - d. Reissue the Request for Proposals
 - e. Invite additional respondents to the proposal
 - f. Request additional information and data from any or all respondents
 - g. Extend the date for submission of responses
 - h. Supplement, amend, or otherwise modify the RFP, and cancel this request with or without the substitution of another RFP
 - i. Disqualify any respondent who fails to provide information or data requested herein or who provides inaccurate or misleading information or data
 - j. Disqualify any respondent on the basis of any real or apparent conflict of interest.
2. By responding to this solicitation, each respondent agrees that any finding by the County of any fact in dispute as to this solicitation or the responses thereto shall be final and conclusive, except as provided herein.
3. NO OBLIGATION TO PAY. The County and Consortium has no obligation, express or implied, to reimburse or pay applicants for any expenses associated with preparing or submitting a response to this request. Applicants understand that proposals are prepared and submitted at their own expense.
4. PROPOSALS PUBLIC KNOWLEDGE. All proposal documents are considered public knowledge. Any information considered to be a trade secret, confidential, or privileged, which is not be made public must be clearly identified as such.
5. CONFLICT OF INTEREST. The Consultant agrees to ensure that, at the time of contracting, the Consultant has no direct or indirect conflict of interest and employs no person or subcontractor with any such known interest.