



**Summit County
Housing Needs Update
Request for Proposals**

Issued: 12/28/2018

Due: 02/18/2019

Summit Combined Housing Authority
PO Box 188
110 Ski Hill Rd
Breckenridge, CO 80424
info@summithousing.us

**Summit County
Market Study**

Table of Contents

Part I:	Introduction
Part II:	Background and Context
Part III:	Scope of Project Work
Part IV:	Submittal Requirements
Part V:	Questions and Addenda
Part VI:	Review and Selection Process
Part VII:	Timeline

Attachments:

- ◇ Attachment A – 2013 Summit County Workforce Housing Needs Assessment (June 2013)
- ◇ Attachment B – 2016 Summit County Workforce Housing Demand Update (August 2016)
- ◇ Attachment C – Summit County Basin Maps
- ◇ Attachment D – Independent Contractor Agreement
- ◇ Attachment E – Acknowledgement of Receipt of RFP Addenda
- ◇ Attachment F – Household Survey from 2014 Needs Assessment Background Info

Part I: Introduction

The Summit Combined Housing Authority (SCHA) is issuing this Request for Proposals for a Housing Needs Update to identify the gap between our current housing market, including projects recently built and underway and our local workforce and their housing needs. The SCHA is a quasi-governmental agency and the Board of the SCHA is composed of representation from the four (4) major towns within Summit County and Summit County.

As Summit County and the Towns of Breckenridge, Frisco, Dillon and Silverthorne, in collaboration with the Summit Combined Housing Authority, plan local affordable workforce housing programs and projects, an updated analysis is needed our local housing landscape (both market rate and affordable) as it relates to local workforce housing supply and demand.

The purpose of this update is to provide information that will be vital to making project decisions (types, size, quantity, target demographics, price point, and location relative to jobs) for use of taxpayer monies for local affordable workforce housing. We need to know/confirm what product types are needed and how many are needed based on our current inventory and trending local demographics. The study will also be used to establish effective workforce housing policies and strategies to effectively guide new residential development and administer the existing inventory of workforce housing.

Part II: Background and Context

The purpose of the 2013 Workforce Housing Needs Assessment was to provide information to be used to establish effective workforce housing policies and strategies, and in conjunction evaluate and plan potential housing developments intended to serve the needs of the Summit County workforce. The last update was completed in 2016, and the landscape has changed rapidly since then, with numerous new projects completed and in the pipeline. Both the 2013 and 2016 studies include projections only through 2020, and the Towns and County are considering options for developments slated for 2020 and beyond. Therefore, the Towns and County need updated information about the current need, deficiencies, and market to inform decisions in 2019, 2020 and beyond. We also acknowledge that the 2020 Census will provide a wealth of new data and that following the Census is likely the appropriate time to do comprehensive Housing Needs Assessment. We believe a simple update now and an in-depth new Housing Needs Assessment with new Census data and local surveys after 2020 will be most efficient with public funds.

Part III: Scope of Project Work

Area of Study, Timeframe, and Budget:

- The proposed geographic area of study is Summit County, including the incorporated Towns. We are also seeking analysis of the demand generated by in-commuters from surrounding market areas where our local workers live (Kremmling, Leadville, and Park County and Denver metro area).
- The study should focus on current conditions with 2-year and 5-year projections,
- The goal date for publishing the Report is July 2019
- The budget for this study will be determined based on RFP responses.

Demographic Study

- Provide an in-depth evaluation of population and demographic trends in Summit County by Basin, including income, age, household size, and employment.
- Although the SCHA and the local jurisdictions do not provide or develop resort seasonal workforce housing, there are many employment peaks in the summer and winter months. Please propose a methodology for how to assess and segregate seasonal housing needs for other (non-resort) employer's vs strictly resort employment.

Assessment of Current and Projected Housing Need

- Analyze housing built and planned since the 2016 update, and how new supply and demographics has changed the housing catch up and keep up projections;
- Identify the housing needs and gaps for the local workforce by income and tenure in 2 and 5 year projections;
- The study should ultimately identify product types needed by Basin to address need by Basin including but not limited to: sale/rental/other, housing type/styles, size, bedroom and bathroom quantities, amenities, parking, cost ranges, etc. i.e. what should we be building?
- Propose how the team would assess if the strategies to move forward from the 2016 Demand Update are still valid; and/or identify any changes to such.

Part IV: Submittal Requirements

It is imperative, when submitting a bid, that the outside of the submission email be addressed as follows and with appropriate text in the email subject line:

Email Address: AmyP@summithousing.us

Subject Line: <Vendor's Name> - Proposal for: Summit County Housing Needs Update

The proposal should include the following:

1. Cover Letter. Summarize the project approach and the key attributes that this firm will bring to the project. If the proposal describes a team approach with multiple firms, identify the lead firm and project manager, and provide the name and contact information for all project team members (include address, telephone numbers and email addresses).
2. Qualifications. Provide a general description of the expertise of each of the firms on the team, identifying the individuals that would be working on the project, with a description of their qualifications, credentials, and related experience; and details regarding their specific role proposed for the project.
3. Project Examples and References. Provide a description of relevant project experience developing a housing needs assessment/market analysis for other communities. Please

include a description of the firm's resources and activities as they relate to knowledge and understanding of the public sector, and list all public entities that the firm has provided both the same and/or similar services to, and the dates of these services.

Please provide a minimum of three (3) professional references. The name, address, telephone number and email for a contact person for the local government/ organization shall be provided, along with a brief description of the work completed, including the project dates and project description.

4. *Project Approach.* Describe the proposal to complete the scope of work, including the techniques, approaches and methods to be used in completing the project. This should include a description of the work program, including a description of the deliverables and activities. An outline of the proposed work plan should accompany the narrative, and any recommended revisions to the scope of work described above should be identified.
5. *Schedule.* Present an initial project schedule for identifying project tasks to be performed, including a timeline with milestones and deadlines for each task. Indicate the total time required to implement the tasks and prepare for ongoing administration.
6. *Fee Estimate.* Provide a detailed cost proposal with a breakdown of the costs to complete the project. Proposals should itemize individual project components in a manner that allows the Housing Authority to differentiate between the costs of each service included in the overall proposal, based on hourly rates for team members and estimated hours to complete project tasks.
7. *County Staff Time and Resources.* Provide an estimate of Housing Authority staff time and any additional resources that will be required for input into this project. The information, assistance and/or other Housing Authority resources needed to complete the project should be identified in the proposal.
8. *Insurance and Independent Contractor Agreement.* The Housing Authority's standard Independent Contractor Agreement is included as Attachment D. Provide a summary of the team's insurance coverage, including public liability, property damage, workers' compensation, automobile, and professional liability; and a written statement confirming that the proponent has reviewed the standard agreement, and identifying any potential requested revisions.
9. *Acknowledgement of Addenda.* Fill out and sign the acknowledgement form included as Attachment E to this RFP.
10. Any additional information that would assist in evaluation of your team's qualifications for this project.

Part V: Questions and Addenda

Any questions can be directed to:

Amy Priegel, Executive Director via email to AmyP@summithousing.us

Any changes, additions, or clarifications in connection with this RFP shall be issued by the SCHA in the form of written addenda posted to the SCHA website. Each proposer must sign the Acknowledgement of Receipt of RFP Addenda (Attachment E) and submit the executed form with the proposal.

Questions shall be submitted by 01/18/2019

Part VI: Review and Selection Process

This is an open and competitive process. The Summit Combined Housing Authority will select the consultant based on a variety of factors including quality of the proposed approach, quality of previous work, cost, and references.

The SCHA intends to engage the most qualified contractor available for this assignment while minimizing the costs to the SCHA. Responsiveness to the RFP will be a principle basis for evaluation. Proposals shall provide a straightforward and concise presentation adequate to satisfy the requirements of the RFP. The proposal should clearly express the contractor's understanding of the SCHA's specific requirements, indicating the contractor's qualifications to conduct this service in a thorough and efficient manner.

The following criteria shall be considered in evaluating the proposals:

- a. Costs for proposed work;
- b. The reputation, experience and efficiency of the contractor;
- c. The ability of the contractor to perform the services in a timely manner;
- d. The contractor's performance under previous contracts; and
- e. Interview evaluation (if necessary).

SCHA reserves the right to conduct such investigations of, and discussions with contractors or other entities as it deems necessary to assist in the evaluation of any proposal or to secure maximum clarification and completeness of any proposal.

Failure to disclose a conflict of interest is a misdemeanor criminal offense under Colorado Law. Such conflict may arise if any public official exercises any substantial discretionary function in connection with a government contract, purchase, payment or other pecuniary transaction

without necessary disclosures as defined by Colorado Revised Statutes (C.R.S.) Section 18-8-308 as amended.

Selection of a contractor will be made based on qualifications, experience, competence, payment terms and fees for services, without emphasis on any one factor to the exclusion of the others. Contract negotiations will take place with the most qualified contractor. If a contract cannot be negotiated, the negotiations will be terminated in writing and negotiations will begin with the next most qualified contractor.

Selection Process. SCHA will select a contractor through a competitive RFP process.

1. SCHA reserves the right to reject any and all proposals, to consider alternatives, to waive irregularities and to re-solicit proposals.
2. SCHA reserves the right to conduct such investigations of, and discussions with, those who have submitted proposals (“Proponents”) or other entities as it deems necessary to assist in the evaluation of any proposal or to secure maximum clarification and completeness of any proposal.
3. All proposals submitted must be valid for a minimum period of ninety (90) days after the date of the proposal opening. Each Proponent must submit with the proposal a list of all subcontractors, independent contractors or sub-consultants employed or proposed to be employed by the Proponent in the performance of the contract.
4. SCHA reserves the right to select the most responsible and responsive proposal which it finds to be within the best interests of SCHA.
5. SCHA makes no guarantees to any contractor until such time as SCHA approves the negotiated contract.
6. The following criteria shall be considered in evaluating the proposals:
 - a. Cost;
 - b. The reputation, experience and efficiency of the Proponent;
 - c. The ability of the Proponent to perform the contract or provide the goods and services within the time specified;
 - d. The comparative quality of the goods and services bid;
 - e. The Proponent’s performance under previous contracts with SCHA;
 - f. The number and scope of conditions attached to the proposal;
 - g. The Proponent’s interest in the project, as well as their understanding of the project scope and the specific requirements of SCHA; and
 - h. The application of all of the above criteria to any sub-consultants, subcontractors or products to be utilized by the Proponent.
7. If a contract cannot be negotiated between the SCHA and the selected Proponent, the negotiations may be terminated by either party and the SCHA will commence negotiations with the next most qualified Proponent. The SCHA makes no guarantees to any Proponent until such time as the SCHA approves the negotiated contract.

The SCHA will arrange for in-person interviews with some or all respondents during the week of 02/25/2019 – 03/05/2019. The SCHA reserves the right to conduct such discussions with respondents or other entities, as it deems necessary to assist in the evaluation of any submittal. The SCHA may request supplemental information or clarification of stated requirements provided up until a final selection is made.

The SCHA shall be under no obligation to comply with the schedule shown above, provided that all prospective proposers or other interested parties known to the SCHA shall be notified equally of changes made to this schedule by the SCHA within a reasonable time after such changes are made. In no event shall any proposer have any redress with the County, be it financial or otherwise, in the event that the SCHA alters this schedule in any way.

Part VIII: Administrative Provisions:

A. General Administrative Provisions:

1. All proposal documents submitted shall become the property of the SCHA.
2. Any restrictions on the use of data contained within a proposal must be clearly stated in the proposal itself.
3. The SCHA is not liable for any costs incurred by the Proponent prior to issuance of a signed contract.
4. The contents of the selected Proponent's proposal will become contractual obligations if a subsequent agreement is reached. Failure of the selected Proponent to accept these obligations may result in cancellation of the award and such Proponent may be removed from future solicitations for services by the SCHA.
5. The SCHA reserves the right to incorporate specific contract provisions, including but not limited to insurance and indemnification provisions, into the Proponent's standard contract or, after the agreed negotiation, incorporate all or some of the standard contract and SCHA's provisions into a new separate revised contract.
6. All products created in response to the contract resulting from this RFP will be the sole property of the SCHA, including but not limited to any electronic data, computer discs, graphic materials, photos, slides, images and regulations.

B. Indemnification and Insurance

Contractor shall indemnify and hold harmless the COUNTY from and against all claims, damages, losses, and expenses arising out of or resulting from acts or omissions of the Contractor, Contractor's sub-contractors or otherwise arising out of the performance of services by Contractor. No later than seven (7) days following the execution of an Independent Contractor Agreement between the COUNTY and Contractor, the Contractor shall provide the COUNTY with certificates of insurance evidencing the types and amounts of insurance specified below:

- Standard Workers' Compensation as required by law in the State of Colorado; and

- Comprehensive General Liability Insurance for operations and contractual liability adequate to cover the liability assumed hereunder with limits of not less than \$400,000 on account of any one person and \$1.2 Million for each occurrence of property damage and personal injury; and
- Automobile Liability insurance in those instances where Contractor uses an automobile, regardless of ownership, for the performance of the Services. Contractor shall carry insurance, written on the comprehensive automobile form insuring all owned and non-owned automobiles with limits of not less than \$400,000 (bodily injury per person), \$400,000 (each accident) and \$400,000 (property damage).

Insurance coverage shall not be reduced below the limits described above or cancelled without the SCHA's written approval of such reduction or cancellation. Certificates of such insurance, of agents and subcontractors, shall be provided to the SCHA upon request. With regard to all insurance, such insurance shall:

- Be primary insurance to the full limits of liability herein before stated and, should the SCHA have other valid insurance, SCHA insurance shall be excess insurance only; and
- Not cancelled without thirty (30) days prior written notice to the SCHA.

C. Late Proposals

It is the responsibility of each vendor submitting a proposal to ensure that emailed proposals arrive to the SCHA by 4:00 pm MST/MDT on February 18, 2019.

D. Proprietary Information

Any restrictions on the use of data contained within a proposal must be clearly stated in the proposal itself.

E. Response Material Ownership

All materials submitted regarding this RFP become the property of the SCHA and will only be returned at the SCHA's option. Responses may be viewed by any person at the proposal opening time and after final selection has been made. The SCHA has the right to use any or all of the material outlined in the Proprietary Information above. Disqualification of a contractor does not eliminate this right.

F. Incurring Costs

The SCHA is not liable for any costs incurred by those who have submitted proposals prior to issuance of a signed contract.

G. Acceptance of Proposal Content

The contents from the selected contractor's proposal will become contractual obligations if a subsequent agreement is reached. Failure of the successful contractor to accept these obligations may result in cancellation of the award and such contractor may be removed from future solicitations.

H. Acceptance Time

The SCHA intends to make a proposal selection within 20 business days after the closing date for receipt of proposals.

I. Budget

Costs for performing services must be included in the proposals and should be clearly stated to allow the SCHA to effectively evaluate each proposal.

Part IX: Timeline

Publication of RFP: 12/28/2018

Deadline for Questions: 01/18/2019

Proposals Due: 02/18/2019

Interviews of Selected Teams: 02/25/2019 – 03/05/2019

Selection and Award of Contract: 03/12/2019