

**CITY OF ASHLAND
COMMUNITY DEVELOPMENT DEPARTMENT
And
HOUSING COMMISSION**

REQUEST FOR PROPOSALS (RFP)

DEVELOP AFFORDABLE HOUSING NEEDS ASSESSMENT

INTRODUCTION

The City of Ashland is presently accepting proposals for the development of an Affordable Housing Needs Assessment. To accomplish this task, the Ashland Community Development Department in conjunction with the Housing Commission is seeking to hire a consultant to perform tasks outlined in the Scope of Work.

SECTION 1: Proposal Submittal and Closing Date

Two copies of the proposal must be received by the Ashland Planning Department by 5:00 p.m. on September 21, 2001. Faxed submittals can not be accepted.

Proposals should be addressed to:

Bill Molnar, Senior Planner
20 E. Main Street
Ashland, Oregon 97520
Phone: (541) 552-2042
Molnarb@ashland.or.us



SECTION 2: Inquiries

Questions that arise prior to the deadline must be submitted in writing no later than 48 hours prior to the deadline and must be addressed to the Senior Planner listed above. As appropriate, questions and answers will be provided to all RFP recipients.

SECTION 3: Scope of Work (Please refer to the attached “Housing Opportunity Study – Scope of Work”)

SECTION 4: Request for Proposal

Information that is required from the applicant as part of the proposal shall include:

1. A statement of the problem in the applicant’s words.

The statement shall include an outline of the objectives and scope of the proposed project.

2. Project background.

The respondent’s understanding of the history of the project or problem, organizational relationships, and limiting factors.

3. Project product to be delivered.

A clear statement of the services to be performed, the form they will take and what the final product or end result will be.

4. Statement of Work.

A concise outline delineating the specific tasks to be performed, indicating what will be done, in what sequence and by whom.

5. Management Plan.

A description of the respondent’s organizational framework, special resources, and any other information to demonstrate that the respondent can effectively and efficiently provide the requested product.



6. Qualifications

Include resumes on each person involved in the project with verifiable references.

7. Cost proposal.

The City of Ashland is anticipating awarding a lump sum contract. The proposal shall provide an offer to undertake the project as proposed at a quoted cost. A rate schedule shall be provided in case of unanticipated change orders.

8. Experience, knowledge and training

The number of businesses offeror has serviced in performing the type of services covered by this RFP, the range of sizes of those businesses and a brief description of the services provided.

9. Schedule of activities.

A chart designed to illustrate who will perform what duties.

SECTION 5: Evaluation

The applicant's proposal and capabilities will be judged according to the following criteria:

1. Understanding the problem (25 pts)

The proposal will be evaluated based on the respondent's understanding of the nature of the project, chief issues, types of services necessary to accomplish the work, coordination issues and delivery of stated needs.

2. Project approach (25 pts)

This response will be evaluated to assess the approach that will be applied to accomplish the objectives set forth in the statement of work. This statement of approach must clearly outline how the work will be completed.

3. Individual capabilities and experience with similar projects (25 pts)

The project will be evaluated based on the experience and skills of the applicant and/or staff as they relate to this project, capacity to perform requested tasks and knowledge and experience with local housing issues.



4. Cost proposal (25 pts)

The proposal will be evaluated based upon the completion of the project in a timely fashion and at a competitive cost.



Housing Opportunity Study
Scope of Work – Needs Assessment

August 24, 2001

Department of Community Development
Planning Division

Project Description

Ashland intends to maintain housing opportunities for an economically and socially diverse population in a community with escalating land and housing costs. To accomplish this goal, the City of Ashland through the Ashland Housing Commission has drafted a 2001 Strategic Plan and is funding two projects for consultants. This project will generate two components: 1) a Needs Assessment and; 2) a Housing Action Plan, designed to achieve the community's housing goals.

Project Description – Needs Assessment Component

This position entails completion of a Needs Assessment based on pre-determined tasks. This information will provide a basis from which an Action Plan will be developed. The compilation of the Action Plan, which includes Program and Funding Strategies, shall be awarded under a separate consultant contract.

Estimated Start Date: October 2001

Task 1. Revise Scope of Work, Establish Timelines

Meet with City Staff/Housing Commission Subcommittee to clarify project goals, tasks, and work schedule. Establish agreement about the extent of the Needs Assessment. Establish meeting schedule for interim reports with Staff/Housing Subcommittee and public involvement meetings.

Deliverable: Memo including a revised and refined scope of work, Needs Assessment agreement with anticipated completion date, interim report schedule, and public involvement meeting schedule.

Estimated Schedule: 3 days

Task 2 Complete a Housing Needs Assessment



Analyze existing housing stock as well as economic and demographic data for the City of Ashland, Oregon. Gather existing information wherever possible and do not create duplicated data where the required data already exists. Utilize existing City of Ashland population and housing projections where necessary.

Task 2.1 Assess the condition of housing stock and land ownership in the city limits, using readily available census data, land ownership data, City records and reports, Ashland Consolidated Plan, economic development data, County and state data, and any other available data. Determine numbers of sales per year for owner-occupied housing.

Task 2.2 Identify vacant land and land ownership. Determine vacant lots suitable for building residential units. Determine the lots that are over-sized per zoning regulations and could be developed for additional units. Identify whether land is privately or publicly owned. Map the vacant land by ownership type and location within residential zones.

Task 2.3 Assess local use and opportunity of employer assisted housing programs. Work with staff results from/or attend interviews of Ashland organization representatives who may have interest in housing opportunities in the community to determine housing needs for employees involved with these organizations.

Task 2.4 Determine vacancy rates for rental housing. Analyze rental rates and rental ranges in the community. Analyze sales of residential property in the past two years. Evaluate and present the results demonstrating absolute and relative increases in rental and sales prices.

Task 2.5 Quantify housing needs for specific economic/population groups utilizing Oregon Housing and Community Development/Land Conservation and Development Department's housing needs model. Compare and contrast actual incomes in the community with incomes required to obtain housing.

Task 2.6 Identify programs employed by communities that have comparable housing opportunity issues as determined by the needs analysis. Similarity in population, economic diversity, business/tourism economy, livability may provide guidance for community choices. However, the opportunity to learn from other examples should not be limited by the choice of similar communities; innovative strategies are desirable. Recognize statutory constraints in Oregon regarding inclusionary zoning.

Deliverable: Draft Needs Assessment Report, summary report of various housing opportunity strategies relevant to Ashland's situation and Maps.

Estimated Schedule: 4 – 5 weeks



Task 3. Preparation of and presentation of Final Report Incorporating Final Comments and Revisions

Task 3.1 Present Needs Assessment findings at a Housing Commission work session.

Task 3.2 Present Draft Needs Assessment at public meeting.

Task 3.3 Revise Draft Needs Assessment based upon public comments.

Deliverable: Final Report, including computer files of all materials

Estimated Schedule: 2 weeks



**CITY OF ASHLAND
COMMUNITY DEVELOPMENT DEPARTMENT
And
HOUSING COMMISSION**

REQUEST FOR PROPOSALS (RFP)

**PREPARE AN AFFORDABLE HOUSING ACTION PLAN
WITH LONG-TERM FUNDING STRATEGY**

INTRODUCTION

The City of Ashland is presently accepting proposals for the development of an Affordable Housing Action Plan, including long-term funding strategies. To accomplish this task, the Ashland Community Development Department in conjunction with the Housing Commission is seeking to fill a temporary contract position to perform tasks and produce deliverables outlined in the Scope of Work. The Action Plan shall be developed in coordination with the results from the Housing Needs Assessment that is anticipated on being completed prior to finalizing Action Plan strategies.

SECTION 1: Proposal Submittal and Closing Date

Two copies of the proposal must be received by the Ashland Community Department - Planning Division by 5:00 p.m. PST on September 21, 2001. Faxed submittals cannot be accepted.

Proposals should be addressed to:

Bill Molnar, Senior Planner
20 E. Main Street
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SECTION 2: Inquiries

Questions that arise prior to the deadline must be submitted in writing no later than 48 hours prior to the deadline and must be addressed to the Senior Planner listed above. As appropriate, questions and answers will be provided to all RFP recipients.

SECTION 3: Scope of Work (Please refer to the attached Housing Opportunity Study Scope of Work – Action Plan)

SECTION 4: Request for Proposal

Information that is required from the applicant as part of the proposal shall include:

6. A statement of the problem in the applicant's words.

The statement shall include an outline of the objectives and scope of the proposed project.

7. Project background.

The respondent's understanding of the history of the project or problem, organizational relationships, and limiting factors.

8. Project product to be delivered.

A clear statement of the services to be performed, the form each task will take and what the final product or end result will be.

9. Statement of Work.

A concise outline delineating the specific tasks to be performed, indicating what will be done, in what sequence and by whom. The statement of work should include a schedule that clearly describes how long each task will require, when meetings and/or work sessions will be held, and when deliverables are due.

10. Management Plan.

A description of the respondent's organizational framework, production capabilities, special resources, and any other information to demonstrate that the respondent can effectively and efficiently provide the requested product.



6. Qualifications

Include resumes on each person involved in the project with verifiable references.

7. Experience, Knowledge and Training

The number of businesses offeror has serviced in performing the type of services covered by this RFP, the range of sizes of those businesses and a brief description of the services provided.

8. Cost proposal

The City of Ashland is anticipating awarding a lump sum contract. The proposal shall provide an offer to undertake the project as proposed at a quoted cost. A rate schedule shall be provided in case of unanticipated change orders.

9. Schedule of activities.

A chart designed to illustrate who will perform what duties.

SECTION 5: Evaluation

The applicant's proposal and capabilities will be judged according to the following criteria:

5. Understanding the problem (25 pts)

The proposal will be evaluated based on the respondent's understanding of the nature of the project, chief issues and types of services necessary to accomplish the work.

6. Project approach (25 pts)

The proposal will be evaluated to assess the approach that will be applied to accomplish the objectives set forth in the statement of work. This statement of approach must clearly outline how the work will be completed.

7. Individual capabilities and experience with similar projects (25 pts)

The proposal will be evaluated based on the experience and skills of the applicant and/or staff as they relate to this project, capacity to perform requested tasks and knowledge and experience with local housing issues.

8. Cost proposal (25 pts)



The proposal will be evaluated based upon the completion of the project in a timely fashion and at a competitive cost.



Housing Opportunity Study
Scope of Work – Action Plan

August 24, 2001

Department of Community Development

Planning Division

Project Description

Ashland intends to maintain housing opportunities for an economically and socially diverse population in a community with escalating land and housing costs. To accomplish this goal, the Ashland Housing Commission has drafted a 2001 Strategic Plan and is funding two projects for consultants. This project will generate two components: 1) a Needs Assessment and; 2) a Housing Action Plan, designed to achieve the community's housing goals.

Project Description – Action Plan Component

This component entails completion of a Housing Action Plan that includes program and long-term funding strategies based on pre-determined tasks. This position will be responsible for developing a priority project and generating the initial funding necessary to support continued implementation of the action plan. The Action Plan shall be developed in coordination with the results from the Housing Needs Assessment that is anticipated on being completed prior to finalizing Action Plan strategies.

Estimated Start Date: October 2001

Task 1. Revise Scope of Work, Establish Timelines

Meet with City Staff/Housing Commission Subcommittee to clarify project goals, tasks, and work schedule timeline. Establish agreement about the extent of the Needs Assessment. Establish meeting schedule for interim reports with Staff/Housing Subcommittee and public involvement meetings.

Deliverable: Memo including a revised and refined scope of work, Action Plan agreement with anticipated completion date, interim report schedule, public involvement meeting schedule.

Estimated Schedule: 3 days



Task 2 Develop a Housing Action Plan that includes project and long-term funding strategies consistent with the Needs Assessment and Housing Commission's draft 2001 Strategic Plan

Task 2.1 Identify specific communities that have comparable housing opportunity issues as determined by the needs analysis. Similarity in population, economic diversity, business/tourism economy, livability may provide guidance for community choices. However, the opportunity to learn from other examples should not be limited by the choice of similar communities. Innovative strategies are desirable. A minimum of 10 communities with housing programs shall be examined, however additional cities may be necessary to obtain a broad base of options. Recognize statutory constraints in Oregon regarding inclusionary zoning.

Task 2.2 Identify and evaluate strategies based on the following categories: Land Use Strategies and Non-Land Use Strategies. Land Use Strategies would include ordinances such as density bonuses and other land use incentives. Non-Land Use Strategies would include such concepts as a land trust or cost reduction for affordable housing, i.e. fee waivers, infrastructure subsidy, etc... d Funding Strategies

Task 2.3 Identify and provide an analysis of financial resources available for land acquisition and development costs associated with the production of affordable housing. Funding tools may include direct financial incentives for affordable housing as well as federal and state funding resources, corporate and local in-kind and cash donations leveraged against broad based funding resources. Provide a concise strategy for tapping into these financial resources, as well as identifying a role for the City of Ashland in the funding of housing projects.

Task 2.4 Interview appropriate individuals of Ashland organizations affected by the housing opportunities in the community, i.e. Oregon Shakespeare Festival, Southern Oregon University, Ashland Community Hospital, Ashland School District, City of Ashland, Ashland Chamber of Commerce, Top 10 employers, concentrated employment sectors (i.e. restaurants), etc... Determine, generally speaking, housing needs for employees involved with these organizations. Determine if there are any employer assisted housing programs and to what extent they are utilized.

Task 2.5 Identify strategies that guarantee affordability from a minimum of 20 to 30 years, as well as through for the life of the structure.

Estimated Schedule: 5 weeks

**Deliverables: Draft Housing Action Plan and Funding Strategies
Summary and notes of interviews**



Task 3. Coordinate and conduct public meetings related to the draft Housing Action Plan and long-term funding strategies.

Task 3.1 Coordinate with Ashland Housing Commission's Sub-committees to conduct two public meetings.

Deliverable: **Summary memo on meeting comments, including meeting minutes**

Estimated Schedule: **1 week**

Task 4. Preparation of and presentation to Housing Commission of Final Report incorporating final comments and revisions

Deliverable: **Final Report, including computer files of all materials**

Estimated Schedule: **1 week**

Task 5. Develop and initiate steps to implement Priority Project identified from the draft 2001 Strategic Plan.

Task 5.1 Work with the Housing Commission on the development and implementation of an identified priority goal from the 2001 Strategic Plan.

Task 5.2 Build working relationships with local and regional organizations and agencies to implement Strategic Plan goal.

Task 5.3 Identify target funding institutions and submit funding proposal(s) that match a Strategic Plan goals with the goals of the funding institution.

Estimated Schedule: **2 months (with possibility of ongoing work)**

