REQUEST FOR PROPOSALS
Comprehensive Housing Assessment
For The Greater Lansing Tri-County Region

Statement of Confidentiality
This Request for Proposals (RFP) has been published for the sole purpose of permitting the recipient to submit a formal response to the Tri-County Regional Planning Commission. The recipient agrees to maintain all submitted information in confidence and will not copy nor disclose any information contained in an official submitted proposal to any person outside the group directly responsible for responding to its contents. The contents of the proposals may not be used for any purpose other than in preparation of a formal response to this RFP.

Purpose of the Project
With changing demographic and employment characteristics expected over the years ahead, it is important for the region’s stakeholders to understand its current housing inventory and the projected changes to the inventory that will influence future housing needs. In addition, it is imperative that we understand existing trends and barriers in today’s market to enable regional and local adaptive change in policies, funding structures and programs, and zoning, codes, and regulations to better align investments in housing for all who call the region home. The Tri-County Regional Planning Commission (“Tri-County”) seeks to partner with a qualified entity to serve as a consultant (“Consultant”) for the purpose of producing a Comprehensive Housing Assessment for the Greater Lansing region.

The Assessment will be used by local governments, housing and real estate developers, and community organizations to help make informed decisions, enabling the Greater Lansing region to grow by investing in suitable housing for all residents.

Study Area
The primary study area shall encompass Clinton, Eaton, and Ingham counties. This area shall include Clinton County and its municipalities of DeWitt Charter Township, the City of DeWitt, Bath Charter Township, and the City of St. Johns; Eaton County and its municipalities of Delta Charter Township, the City of Grand Ledge, and the City of Charlotte; Ingham County and its municipalities of the City of Lansing, the City of East Lansing, Lansing Charter Township, Meridian Charter Township, Delhi Charter Township, the City of Mason, and the City of Williamston.

Defined Objectives
The assessment will consist of a data-driven current market conditions report at the county and city level, as well as recommendations for policy changes, new policies, and actions to incentivize housing development, redevelopment, and rehabilitation.
1. Work with Tri-County staff to select members of a steering committee that will advise during the assessment.
2. Facilitate regular steering committee meetings for the duration of the project.
3. Profile the housing market (both rental and owner-occupied), not limited to but including age, tenure, size, and capacity of existing housing stock and housing currently in development. Data captured should be integrated into GIS format, with supporting charts, graphs and analysis as needed.
4. In coordination with Tri-County staff, work with local stakeholders to gather necessary data/information to produce GIS layers that map barriers to housing opportunities including transit, food deserts, and crime.
5. Profile the rents and property values of the existing and projected housing market at various income levels and define housing affordability for renters and homeowners at these income levels.
6. Evaluate existing housing policies, programs, and funding sources to determine how to re-position local government and community partners to address housing challenges at the root causes. Identify best practices and report on successful precedents throughout the country.
7. Estimate current housing gaps, including for moderate-income families and middle-density structures, and future housing needs based on demographics, economic trends and other factors as defined by the consultant.
8. Develop and execute a community engagement strategy.

Scope of Work
Tri-County seeks the following services from the Consultant; additional services that add to a more complete Housing Assessment may be described in your proposal.

Initial Research and Development of Methodology
This task includes the review and evaluation of potential data sources (including local and national sources), the identification of indicators for inclusion in the statistical analysis, and the development of the proposed design of the Housing Assessment. The outcome of this task will be a written summary of the proposed methodology for review by Tri-County.

Additionally, the Assessment should show a plan to provide data-driven answers to the following questions, in addition to any other researchers choose to add to the list:

1. How have the housing needs of the Tri-County region changed between 2000 and 2020 and how do those needs match the housing stock available?
2. What are the most likely critical housing needs for the region in the next five years?
3. What are the housing needs for residents in specific demographic groups, or with specific needs, that the private market is not likely to address?
4. How do housing needs differ across urban, suburban, exurban, and rural landscapes and what is the condition of the housing available in each category?
5. What does affordability look like at different income bands and how is the region doing?
6. What are the region’s workforce housing/missing middle needs, how are they being addressed, and what role does workforce housing play in economic development? What are workers’ commuting patterns?
7. How effective are the existing public programs in addressing current housing problems in the region and where are the gaps between private market activity and the public programs?
8. What are the specific barriers, both local and at a larger scale, that currently prevent appropriate housing development and rehabilitation?
9. How can public, private, and non-profit partnerships best prioritize programming to address housing needs and effectively target all available resources?
10. What is the best role for the Tri-County to fulfill in housing going forward?

Data Collection
The Consultant will be responsible for all data collection. Tri-County staff will assist the Consultant in accessing data wherever possible. In May 2021, Tri-County published an economic impact analysis report that profiled the region prior to the pandemic and what impacts had been seen to date. This report includes demographic and economic data that will be helpful to the Consultant.

Validation
The Consultant will conduct field work as necessary to validate the analysis.

Future uses of data and tool creation
Include with the final report the recommendations of the firm as to the best way to update the study every two years, along with associated costs. In addition, the Consultant will identify the types and costs of developing additional supporting information, such interactive dashboards, additional data investments, and/or relevant toolkit creations for public, private, and nonprofit stakeholders to utilize as they plan for growth and development throughout the region. The goal of this project is to provide stakeholders and municipal leaders the data sources, tools, and current interactive resources needed to make informed decision making in support of the region’s vision for growth and prosperity.

Community engagement plan
Solicitation and management of community/public input will be essential to ensure the feasibility and acceptance of the data, analysis, and recommendations of the Assessment. An effective community engagement plan to include residents, landowners, businesses/employers, neighborhood associations, developers, financial representatives, nonprofit organizations, churches, the philanthropic community, and elected officials is important. The Consultant should propose the best method to ensure public input including community meetings. A summary of those meetings should be included in the final housing Assessment. This must include smaller meetings with stakeholders representing all aspects of the community as well as larger public workshops.

Recommendations regarding preferred housing strategies shall be developed through a public process that both educates the community on the region’s housing needs and gaps, and that engages the community in a meaningful discussion of options that could be implemented to address them. This process shall include multiple strategies for involving interested residents and stakeholders, including concerted efforts to connect with residents in lower-income categories that experience the greatest challenges with securing safe and adequate housing. Such efforts might include virtual or in-person meetings, workshops or open houses, social media efforts, surveys, site visits, stakeholder interviews, focus groups, developer/landlord input, or other means.
Implementation Recommendations
Ensure that the final report includes recommendations for implementation and best practices. This section should include, but is not limited to, the following:

- A discussion of opportunities and challenges for the region;
- Specific information about funding sources for housing development, including an assessment of public sources and tax credit programs (Low-Income Housing Tax Credits, New Market Tax Credits, Michigan Housing Finance Authority programs, etc.);
- Analysis of existing policies, zoning, codes, and other regulations, and
- Identification of key actors for implementation.

The proposal should describe the level of detail that Tri-County should expect.

Products and Deliverables required to satisfy the Contract
The following is expected to be produced by the selected firm:

- A detailed Work Plan Schedule, including estimated completion times for each milestone, allocated staff time per phase, and an overall timeframe for completion of project;
- A detailed community engagement strategy, including identification of critical regional participants and complete outline of methodology to be used, such as planned outreach and communications, surveys, workshops, meetings, and additional tools and resources required;
- A detailed outline of the Housing Assessment structure, including but not limited to:
  - An Executive Summary;
  - Detailed methodology describing targeted use of data, GIS mapping, and analysis;
  - Identified critical gaps in local, regional, and statewide housing networks, and
  - Any additionally identified areas for opportunity to offer recommendations, including best practice observations within current/recent housing market analysis, targeted investment strategies, and strategic planning processes.
- Monthly progress reports/billings, including summary of outputs and associated staff time;
- Draft Housing Assessment, including complete narrative, executive summary, all data sets, GIS mapping, related summaries of analysis, and an action plan that includes identified targeted strategies, best practices, and funding options;
- Final Housing Assessment following input and edits provided by Tri-County staff, and
- Any associated data, including all GIS layer files (ESRI format), with ownership belonging to Tri-County, and the ability to modify and update in the future.

The Consultant shall provide the complete text with all associated tables, graphs, and charts delivered via a cloud-based platform, using a commonly available format(s) agreed upon by both parties. In addition, Tri-County expects the following:

- An Executive Summary for stakeholder use;
• One public presentation of the FINAL version of the Assessment to Tri-County’s Regional Economic Collaborative at a showcase presentation with Q&A session, and
• One public presentation of the FINAL version of the Assessment to Tri-County’s Board of Commissioners with Q&A session.

Defined timeline for all Deliverables

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Deliverable</th>
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<tbody>
<tr>
<td>Monthly</td>
<td>Progress reports and billings</td>
</tr>
<tr>
<td>October 1, 2021</td>
<td>Contract signed and Notice to Proceed issued</td>
</tr>
<tr>
<td>November 1, 2021</td>
<td>Finalized Work Plan Schedule, Community Engagement Strategy, and Housing Assessment Structure</td>
</tr>
<tr>
<td>March 31 , 2022</td>
<td>Completion of Community Engagement Sessions</td>
</tr>
<tr>
<td>April 30, 2022</td>
<td>Completed draft of Housing Assessment for review</td>
</tr>
<tr>
<td>May 31, 2022</td>
<td>Completed final Assessment, including all Tri-County staff edits</td>
</tr>
<tr>
<td>June 2022 - TBD</td>
<td>Presentation of findings to Tri-County’s Regional Economic Collaborative committee</td>
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<tr>
<td>June 2022 - TBD</td>
<td>Presentation of findings to Tri-County’s Board of Commissioners</td>
</tr>
<tr>
<td>June 30, 2022</td>
<td>Presentations complete and final documents, data, and supporting products delivered to Tri-County in agreed upon formats</td>
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Proposal Requirements

Proposals shall include a concise statement of the consultant’s approach to the project and a summary of the Consultant’s ability to provide the required services.

Proposals should, at a minimum, include:

• A Cover Letter with the following information attached:
  1. Name and address of firm(s) and identification and contact information of the Project Lead;
  2. Identification of Project Manager and all other team members – as well as any subcontractors to this project – and assigned duties, including a percentage breakdown of personnel hours and associated costs;
  3. Statement of qualifications. This statement should include a resume, a description of previous similar work, and a list of projects completed;
4. A clear description of how your firm would complete this project, including scope and methodology, and
5. A detailed Work Plan Schedule, including estimated completion times for each milestone, allocated staff time per phase, and an overall timeframe for completion of project.

- Names and contact information of at least three (3) client references to whom the applicant has provided services similar to the project described within this RFP. Include a brief summary of the project completed, outline of services provided, detailed schedule of work within timeframe, and approach to working with staff and community;
- A proposed Scope of Work with total project budget and detailed workplan. At a minimum, the scope of work shall provide itemization of all costs and services and a billing schedule for each phase of the project as identified within the proposed timeline. The workplan also should include community engagement strategies, and recommendations for components and structure of the Assessment document;
- All prices quoted must be firm for a period of Ninety (90) days after the proposal due date;
- A statement identifying any actual or potential conflicts of interest of any consultant or team member should be included as an addendum to your bid documents;
- A cost proposal for a specific “not to exceed” fixed fee, including associated fees (i.e. printing costs, attendance at meetings, travel) shall be included with the initial submittal, and
- A requested payment schedule that should accompany the work schedule.

Complete Project Timeline

<table>
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<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>August 4, 2021</td>
<td>Request for Proposals Issued</td>
</tr>
<tr>
<td>August 11, 2021</td>
<td>Proposal Questions Due</td>
</tr>
<tr>
<td>August 16, 2021</td>
<td>Questions and Answers Made Available</td>
</tr>
<tr>
<td>August 25, 2021</td>
<td>Project Proposals Due</td>
</tr>
<tr>
<td>September 2 - 10, 2021</td>
<td>Candidate Interviews</td>
</tr>
<tr>
<td>September 13, 2021</td>
<td>Preferred Consultant Notified</td>
</tr>
<tr>
<td>September 22, 2021</td>
<td>Board of Commissioners' Approval of Selected Consultant</td>
</tr>
<tr>
<td>September 29, 2021</td>
<td>Contract Negotiations Completed</td>
</tr>
<tr>
<td>October 1, 2021</td>
<td>Contract Awarded and Notice to Proceed Issued</td>
</tr>
<tr>
<td>May 31, 2022</td>
<td>Final Report Due</td>
</tr>
<tr>
<td>June 30, 2022</td>
<td>Final Documents, Data, Supporting Products, and Presentations Completed and/or Delivered to Tri-County</td>
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Evaluation Criteria and Selection Process

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<tr>
<th>Criteria</th>
<th>Points Possible</th>
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<td>Demonstrated understanding of the need and objectives, ability to meet the RFP requirements, and effectiveness at addressing the proposed Scope of Work</td>
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How well the proposal addresses techniques for diverse public/private stakeholder engagement, data analysis and integration, comprehensive housing assessment strategies and supporting implementation initiatives | 15

The proposed schedule and the ability to complete the work by the scheduled due date, as well as the timely delivery of deliverables at defined milestones | 20

Relevant prior experience and education of the consulting team, including project manager and designated staff, as well as any subcontractors | 20

The Consultant’s experience and demonstrated willingness and success working as a cooperative team with other firms, local units of government, and stakeholder groups, with additional focus on previously established regional involvement. | 15

Price and ability to complete the proposed work within the defined budget | 15

Originality and/or innovativeness | 5

Total Possible Points | 100

**Budget**
The maximum budget to be awarded is $125,000.00.

**Submission Instructions**
Interested candidates must submit complete proposals to info@mitcro.org by 4:30 p.m. EST (COB) on August 25, 2021. All questions pertaining to this RFP must be submitted electronically to relsinga@mitcrpc.org by August 11, 2021 (COB). All submitted queries and formal responses will be shared publicly and made available on Tri-County’s website by August 16, 2021. Firms that submitted any questions will also be notified directly upon posting. No verbal requests for information or contact with Tri-County, its staff, or selection committee members will be accepted and may result in disqualification.

Proposals must be submitted in a .pdf electronic format that allows for printing/viewing and distribution by Tri-County to its staff and selection committee. The entire proposal submission, including all materials, attachments, appendices, diagrams, et cetera must be less than 30 pages, single-spaced, with one-inch margins and 11-point font or larger.

**Additional Information, including Non-Discriminatory Practices**
Tri-County will compare the competitive advantages of all complete offers with those from other responding companies. Vendor selection will be performed by a committee of economic development professionals and other stakeholders comprised of participating Tri-County partner organizations. Proposals will be evaluated in terms of satisfaction of the technical requirements set forth in this RFP, quality, delivery schedule, price, project management, and risk management.

Tri-County intends to identify a shortlist of qualified respondents to select a vendor for this project. If the parties cannot reach an acceptable agreement, Tri-County will then open negotiations with the next qualified Consultant as identified by Tri-County. This RFP is not an offer to contract. Issuance of this RFP and the receipt of responses by Tri-County do not commit Tri-County to award a contract to any vendor. Tri-County reserves the right to reject any proposals,
or parts thereof, and to negotiate the services and contract terms with the selected Consultant prior to contract award.

As this contract will be funded by federal grant dollars allocated to Tri-County, the selected Consultant must comply with all terms and conditions under the provisions of the Federal Procurement Regulations, Title 41, Parts 1-15. All information provided within submitted proposals, and any resulting contracts, are subject to disclosure under the provisions of the "Freedom of Information Act,” 1976 Public Act No. 442, as amended, MCL 15.231, et seq.

The contract will be executed in accordance with Tri-County’s Operating Policies and Procedures on a standardized contract form and will include, as closely as possible, the proposal contents provided in this RFP and associated language within the selected submission. The contract will be based upon a unit cost or lump sum, with a "not to exceed" clause. Costs shall be reimbursed upon the accomplishment of defined milestones within the proposed timeline based on the approval/acceptance of Tri-County management, to begin upon award and to conclude within 6 months of project closing date, unless otherwise negotiated.

Tri-County may accept or reject any proposal regardless of the requirements stated in this RFP have been met. In addition, Tri-County reserves the right to negotiate further with bidding entities. Your response to this RFP constitutes an offer by you to do business with Tri-County on the terms stated within your proposal and does not constitute a formal agreement.

Neither Tri-County nor the project will bear any costs incurred in the preparation on submission of proposals. Any such costs are the sole responsibility of the Consultant.

The proposal submitted shall become the contractual obligations for the project, subject to minor negotiation with Tri-County. Failure to accept these obligations may result in cancellation of the award.

Tri-County reserves the right to revise any part of this RFP or to provide additional information. Tri-County will post and share addenda, if any, on its website.

**Non-Discriminatory Practices**

Tri-County hereby notifies all bidders that Disadvantaged Business Enterprises, Minority and Women-owned business enterprises will all be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, religion, national origin, sex, age, height, weight, conditions of pregnancy status, marital status, physical or mental limitation, disability, source of income, family responsibility, educational association, sexual orientation, gender identity or expression, or HIV status (civil rights status) or have the effect of defeating or substantially impairing accomplishment of the objectives of the program because of their civil rights status in consideration for an award in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 USC 2000d-d4.

Further, Tri-County procurement procedures encourage a minimum goal of fifteen (15) percent participation by disadvantaged business enterprises (DBE’s), including Women Business Enterprises (WBE) and Minority Business Enterprises (MBE). The selected consultant firm is expected to carry out this policy to the fullest extent possible consistent with the efficient performance of the project. The Consultant is encouraged to submit the names and describe the work of the DBE’s. Consulting firms who fail to demonstrate a good faith effort to meet the DBE
goal of the contract may be deemed ineligible for award.

In addition, the successful Consultant will covenant that it will not discriminate against an employee or applicant of employment with respect to hire, tenure, terms, conditions, or privileges of employment or a matter directly related to employment in accordance to Tri-County's Title VI Non-Discrimination Plan, and the Economic Development Administration's Department of Commerce discrimination policies outlined in the Title 13 Code of Federal Regulations. The Consultant will require the same non-discrimination assurances from any sub-contractors.