

**GRAND COUNTY & CITY OF MOAB
REQUEST FOR PROPOSALS**

**Economic Study for Assured Housing Policy
(aka Inclusionary Zoning or Fair-share Housing)**



RESPONSES DUE BY 5:00 PM, ON July 31, 2017

CONTACTS

The primary contacts for questions regarding this RFP will be Zacharia Levine, Grand County Community Development Director (zlevine@grandcountyutah.net). The secondary contacts for questions regarding this RFP will be Amy Weiser, City of Moab Community Services Director (aweiser@moabcity.org) and Ruth Dillon, County Council Administrator (rdillon@grandcountyutah.net)

City Hall is located at 217 E. Center St., Moab, UT, 84532. The URL for the City's website is www.moabcity.org. The County Courthouse is located at 125 E. Center St., Moab, UT, 84532. The URL for the County's website is www.grandcountyutah.net.

This Request for Proposals is intended to solicit competitive responses for conducting an economic analysis necessary to assist Grand County and the City of Moab in integrating affordable housing incentives and requirements into their respective land use codes.

All applicants are encouraged to thoroughly review this solicitation prior to submitting. The County and City reserve the right to reject any or all proposals received. Furthermore, the County and City shall have the right to waive any informality or technicality in proposals received when in the best interest of the County and City.

PROPOSED TIMELINE

RFP Issued	June 19, 2017
Optional Q&A Phone Call with Interested Consultants	July 10, 2017
Deadline for Proposed Submission	July 31, 2017
Consultants Selected for Interviews	August 2017
Interviews Conducted	August 2017

INTRODUCTION

Grand County and the City of Moab are seeking a consultant to prepare a high-quality and comprehensive economic study to support their efforts in developing assured housing (aka inclusionary zoning or fair-share housing) policies in their respective jurisdictions. This request for proposals (RFP) is announced by both jurisdictions due to the relative size and interconnectedness of their housing markets and economic activities.

It is expected that the selected firm will conduct a focused economic analysis on the relationship between new residential and commercial development and affordable housing, and prepare a report that contains specific recommendations for an assured housing ordinance the City and County may adopt individually or jointly. The report shall detail the recommended affordable housing set-aside requirements and incentives to be included in the ordinance, as well as zoning changes needed to support the ordinance(s). The selected consultant will be one who has demonstrated experience in the preparation of economic feasibility and nexus studies related to assured housing.

ABOUT THE CITY AND COUNTY (“MOAB AREA”)

The Moab Area is known for its iconic red rock landscapes, abundant outdoor recreational opportunities and high quality of life. It is home to Arches and Canyonlands National Parks, Deadhorse Point State Park, and the Manti-La Sal National Forest. The Colorado River flows northeast to southwest through Grand County, and the Book Cliffs serve as a northern boundary line.

Although the City has a full-time population of around 5,000 and the County 10,000, the Area hosts more than 3 million visitors from around the world each year. Tourism and recreation are the primary economic drivers, accounting for roughly 60% of all employment. Mining and minerals extraction has had a continuous presence in Grand County since the 1920s. In recent years, the construction of a new regional hospital, several community buildings, and fiber optic telecommunications infrastructure has fueled growth in the professional and technical services industries. With the promise of a four-year university campus (USU Moab) coming online in the near future, an expanded airport set for completion in 2019, and ongoing growth in the tourism sector, Grand County is poised to see additional development and economic expansion in the coming decade.

STUDY AREA

The study area shall consist of the Spanish Valley areas of Grand and San Juan County. The City and County recognize that land use regulations they adopt do not regulate land use in San Juan County, but for the purposes of this RFP, housing built in the Spanish Valley area of San Juan County is effectively part of the Moab Area housing market. To be clear, the City and County have different land use codes. There is desire to make them complimentary to facilitate orderly growth in both jurisdictions, and assured housing policies are no exception. Still, they will remain separate, and different, codes for the foreseeable future.

RELATED CITY AND COUNTY EFFORTS

Connected to the efforts of this RFP, the City and County recently adopted an affordable housing plan as appendices to their respective general plans. The affordable housing plan identifies the adoption of an assured housing ordinance as a near-term action item. The jurisdictions, individually and together, have also hosted several public workshops, panel discussions, and leadership meetings related to affordable housing findings and strategies. On March 29 and 30, 2017, the City and County co-sponsored an affordable housing summit with many private-sector partners in attendance.

In fall 2016, the Grand County Community Development Director drafted a mandatory assured housing ordinance for residential and commercial developments over a minimum size. As an interim step towards a mandatory policy, the County is currently deliberating over a voluntary, incentive-based ordinance that utilizes high density development overlay districts. In order to address the feasibility, defensibility, and structural integrity of a mandatory policy, the City and County are requesting an economic study to establish and justify the ordinance details for their respective codes.

The consultant's report shall explicitly address the following:

- Economic feasibility of assured housing
- Implications of a mandatory vs. voluntary policy with respect to affordable housing production
- Recommended affordable housing set-aside percentages
- Recommended incentives to be offered
- Recommendations regarding fee in-lieu levels used as a compliance alternative

SCOPE OF WORK

The scope of work may include, but is not limited to:

1. Review the Moab Area Affordable Housing Plan, the County's high density development overlay districts, and a DRAFT assured housing ordinance (attached), and other pertinent City, County, and State regulations.
2. Analyze demographic and socioeconomic data, housing markets, employee generation in commercial developments, labor force characteristics, and other data as necessary.
3. Validate the nexus between the development of market-rate residential construction and the demand for below market-rate housing as well as the nexus between various types of non-residential buildings and the housing needs of lower and moderate income employees

whose jobs are directly or indirectly produced or induced, by the development of such facilities

4. Analyze and determine the feasibility of a mandatory assured housing ordinance given current land and construction costs within the Study Area.
5. Analyze and determine appropriate affordable housing set-aside requirements, fee-in-lieu options, and incentive levels to be included in mandatory assured housing ordinances.
6. Analyze and determine zoning density changes needed to support a mandatory assured housing ordinance within the Study Area.
7. Discuss and recommend challenges and tools for implementing an effective assured housing policy in a multi-jurisdictional environment.
8. Discuss and recommend methodology and timing for updates to the assured housing ordinances.
9. Meetings:
 - a. The selected consultant will be expected to periodically interface with staff (in-person meetings and/or conference calls) concerning the approach and tasks throughout the project. The consultant should have frequent interaction with staff to ensure that the City's and County's desired objectives are met and that the City's and County's unique concerns are addressed. The consultant will also be expected to consult with the County's legal counsel regarding Utah exaction laws.
 - b. Preparation and facilitation of up to two workshops with each jurisdiction's planning commission and council (four workshops total).

SUBMITTAL REQUIREMENTS

1. Cover Letter

Present a brief understanding of the City and County's needs based upon the information provided in the Scope of Work. Summarize the Applicant's qualifications most relevant to this project and identify the team leader (project principal) with mailing address, telephone and fax numbers and e-mail address. The Applicant certifies that the information and terms provided in response to this Request for Proposal is true, accurate and good for 90 days.

2. Statement of Qualifications

Each Applicant must demonstrate in their submittal that they have the professional capabilities and the organizational and administrative experience needed to accomplish this project.

The Statement of Qualifications should contain specific responses to the following requested items:

- a. **Statement of Approach of Team:** Describe the specialized experience and project approach of the team. Indicate the team leader and her or his specific role. Briefly discuss the approach to team management and organization. Describe the team's approach.
- b. **Specific Project Experience:** Provide information on similar or relevant projects which team members have executed. Note projects completed within budget and schedule.
- c. **Firm/Team Qualifications:** Demonstrate professional experience in working with regulatory programs as they pertain to affordable housing, assured housing (aka inclusionary zoning) programs, and development impact studies. Demonstrate recent, relevant experience particularly in:
 - i. Employee Generation models;
 - ii. Nexus studies connecting residential and commercial development to a community's need for affordable housing;
 - iii. Models for calculation of development incentives within assured housing programs; and,
 - iv. Models for calculation of in-lieu fees.
- d. **Proposed Project Team Members:** Submit a written description of the team composition, disciplines and the primary role of each individual on the team indicating respective roles, responsibilities and related experience and qualifications. Also include an organizational chart. The information must clearly indicate the team leader for this project and the responsible party in each firm who will be providing the required professional experience. If a team approach is used, provide example of projects completed by the team.
- e. **Individual Experience:** Provide a description of the background of the key members of the team and their specific participation in previous projects that would directly relate to the work to be done for this project. This may be done in descriptive text or in a short- form (one page or less) resume.
- f. **Quality Control:** Describe the ability to undertake and complete quality projects on time and within budget. Indicate current work load and the capacity of the firm/team to undertake this project. Has the firm/team or individual engaged in litigation, arbitration or mediation as a result of design errors of omission? If yes, please explain.

- g. List of References: List three (3) references with which the firm/team or key members of the team have worked in the last five (5) years, for projects of similar size or scope, indicating projects done. Provide all contact information, such as address, telephone number, fax number and email address. Proposals that do not provide a completed section for references will not be considered further.

3. Work Plan

Provide a preliminary work plan identifying the tasks to be accomplished, the positions or individuals anticipated to execute each task, hours anticipated for each task and proposed deliverables, proposed schedule, management plan, and timeline for completing services. The exact scope, timeline, deliverables, and Not-to-Exceed total will be negotiated with the selected Consultant Team prior to execution of the contract. A presentation on findings and recommendations should be scheduled at the very latest by December 31, 2017.

4. Supplemental Material

The Applicant can provide supplemental material to support the firm/team's selection for this process.

5. Evidence of Ability to Obtain Insurance.

- a. General Liability insurance written on an occurrence basis with limits no less than Two million dollars (\$2,000,000) combined single limit per occurrence and Four million dollars (\$4,000,000) aggregate for personal injury, bodily injury and property damage. The Service Provider shall increase the limits of such insurance to at least the amount of the Limitation of Judgments described in Section 63-30d-604 of the Governmental Immunity Act of Utah, as calculated by the state risk manager every two years and stated in Utah Admin. Code R37-4-3.
- b. Professional Liability (Errors and Omissions) insurance written on claims made basis with limits no less than One million dollars (\$1,000,000) combined single limit per occurrence.
- c. Automobile Liability insurance with limits no less than Two million dollars (\$2,000,000) combined single limit per accident for bodily injury and property damage.
- d. Workers Compensation insurance limits written as follows: Bodily Injury by Accident Five hundred thousand (\$500,000) each accident; and Bodily Injury by Disease Five hundred thousand (\$500,000) each employee, Five hundred thousand (\$500,000) policy limit

The selected firm will be required to submit a policy endorsement naming the City of Moab and Grand County, Utah as additionally insured.

FEE SCHEDULE

All work will be done on an hourly fee basis with a Not-to-Exceed total amount. The proposal must include a list of hourly billing rates for all personnel involved in the project – for the Project Principal as well as Sub-Consultants. A Not-to-Exceed Fee (including estimated hours and reimbursable) proposal shall be submitted as part of the proposal. The exact scope, timeline, deliverables, and Not-to-Exceed total will be negotiated with the selected Consultant Team prior to execution of the contract.

SELECTION PROCESS

The RFP Selection Team will hold one pre-submittal question and answer meeting for interested firm leaders to learn more about the project prior to submission of the proposal. The meeting will be held on Monday, July 10, 2016 from 10:00am until 11:30am. All are invited to participate by phone – dial 435-259-4138, press 1 for the conference line and press 123456 for the conference pin. Contact Zacharia Levine (435-259-1371/zlevine@grandcountyutah.net) if you have questions.

All respondents must address submittal requirements outlined above. Non-responsive submittals (those not conforming to the RFP requirements) will be disqualified and will not be considered further. Each respondent bears the sole responsibility for the items included or not included in its submittal. Deviations from or exceptions to the terms and specifications contained within this RFP, if stipulated in a submittal, while possibly necessary in the view of the submitting respondent, may result in disqualification.

After evaluation of the complete proposals received in response to this RFP, the Selection Committee may conduct interviews with one or more of the Applicants.

During the interviews, Applicants will be encouraged to elaborate on why they are the best choice for this work and provide their vision and philosophy. Interview questions may include additional information about prior projects and experience as well as performance data, project approach, and staff expertise relevant to the project. The City and County expect the key personnel proposed for the project to be present at the interviews.

At the conclusion of the interviews, the Selection Committee shall rank, in the order of preference, the Applicants whose professional qualifications and proposed services are deemed most meritorious.

Negotiations, including the final scope of work, shall then be conducted with the Applicant ranked first. If a contract satisfactory to the City and County can be negotiated at a fee considered fair and reasonable, the award shall be made to that Applicant. Otherwise, negotiations with the Applicant shall be formally terminated and the City and County will move on to the next Applicant.

The City and County reserves the right to complete the selection process without proceeding to an interview process, and may choose to select an Applicant based on the information supplied in the Statements of Qualifications. The City and County reserve the right to select the Applicant(s) whose qualifications, in the City and County’s sole judgment, best meet the needs of the City and County. Price may not be the sole deciding factor. The City and County reserve the right to reject any and all applications. Award of contract may be subject to approval by the Councils of the City of Moab and Grand County.

Evaluation Criteria Weighting

Criteria	Weighting
Evidence of team’s ability to perform the required services	25 percent
Qualifications/expertise of the key personnel on the team	20 percent
Past performance and record of successful completion of similar work	20 percent
Evidence of availability of staffing to begin work immediately upon award of Contract	20 percent
Proposed Fee Schedule	15 percent

SELECTION COMMITTEE

The Selection Committee shall consist of the following 7 individuals

City of Moab:

David Everitt, City of Moab Manager

City Council Member

Amy Weiser, City of Moab Community Services Director

Grand County:

Ruth Dillon, Grand County Council Administrator

Grand County Council Member

Zacharia Levine, Grand County Community Development Director

Interlocal Housing Task Force:

Benjamin Riley, Housing Authority of Southeastern Utah Director

SUBMITTAL INSTRUCTIONS

An electronic copy of responses to this RFP must be received on or before **5:00pm MDT** on **Monday, July 31**. Proposals will not be accepted by fax.

One (1) physical copy of responses to this RFP must be received on or before **5:00pm MDT** on **Wednesday, August 2, 2017**. Respondents must allow sufficient delivery time to ensure receipt of materials by the time and date specified.

Proposals should be addressed to:

Amy Weiser
City of Moab Community Services Director
aweiser@moabcity.org
217 E. Center St./Moab, UT/84532

Zacharia Levine
Grand County Community Development Director
zlevine@grandcountyutah.net
125 E. Center St./Moab, UT/84532

Statements should be signed by a duly authorized official(s) of the firm(s). Consortia, joint ventures, or teams submitting proposals, although permitted and encouraged, will not be considered responsive unless it is established that all contractual responsibility rests solely with one contractor or legal entity which is not a subsidiary or affiliate with limited resources. Each submittal should indicate the entity responsible for execution on behalf of the team. Firms or teams will be evaluated, among other things, as to relevant experience, ability to begin and complete the work, and feedback from references. Submissions will be subject to Government Records and Retention Management Act and may be subject to disclosure unless accompanied by appropriate claims under the Act.