



DANE COUNTY
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION

REQUEST FOR PROPOSAL (RFP)

Revised 06/2021

RFP NUMBER: **122023**

RFP TITLE: **Dane County Regional
Housing Strategy**

RFP DEADLINE: **Wednesday, March 16, 2022
2:00 p.m. (CST)**

**PROPOSALS
MUST BE
UPLOADED TO:** **Purchasing Bid Dropbox
www.danepurchasing.com**

Late, faxed, mailed, hand-delivered or unsigned proposals will be rejected

**MANDATORY
VENDOR
CONFERENCE:** **Thursday, February 3, 2022 at
10:00 AM via ZOOM.**
Please pre-register for the conference by
Monday, January 31, 2022. To pre-register,
please email
rogan.megan@countyofdane.com and
request the Zoom link.

**DIRECT
ALL INQUIRES TO:** **Megan Rogan**
Purchasing Officer
(608)283-1487
Rogan.megan@countyofdane.com
www.danepurchasing.com

PROPOSAL SUBMISSION CHECKLIST

- | | | |
|---|--|--|
| <input type="checkbox"/> Update Vendor Registration | <input type="checkbox"/> RFP Response
(Separate from Cost Proposal) | <input type="checkbox"/> Upload RFP Response and Cost Proposal to Purchasing Bid Dropbox |
| <input type="checkbox"/> Read Entire RFP Document | <input type="checkbox"/> Cost Proposal
(Separate from RFP Response) | |

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1.0 RFP OVERVIEW

1.1 Introduction

The purpose of this document is to provide interested parties with information to enable them to prepare and submit a proposal according to the specifications set forth within this document.

The County intends to use the results of this process to award a contract or issue of purchase order for the product(s) and or services(s) stated.

The Dane County Purchasing Division is the sole point of contact for questions and issues that may arise during the RFP process.

1.2 Clarification of the Specifications

All inquiries concerning this RFP must be **emailed** to the **person indicated on the cover page** of the RFP Document.

Any questions concerning this RFP must be submitted in writing by e-mail on or before the stated date on the **Calendar of Events** (Section 1.4).

Proposers are expected to raise any questions, exceptions, or additions they have concerning the RFP document at this point in the RFP process. If a proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the proposer should immediately notify the contact person of such error and request modification or clarification of the RFP document.

Proposers are prohibited from communicating directly with any employee of Dane County, except as described herein. No County employee or representative other than those individuals listed as County contacts in this RFP is authorized to provide any information or respond to any question or inquiry concerning this RFP.

1.3 Vendor Conference

A **mandatory** conference will be held to respond to written questions and to provide any needed additional instruction to vendors on the submission of proposals. All vendors who intend to respond to the RFP **shall** attend the vendor conference. If a vendor fails to attend the conference and submits a proposal, the proposal will be rejected.

Date: February 3, 2022

Time: 10:00 AM

Location: Via ZOOM. Please pre-register by emailing rogan.megan@countyofdane.com with a request for the ZOOM link.

1.4 Calendar of Events

Listed below are specific and estimated dates and times of actions related to this RFP. The actions with specific dates must be completed as indicated unless otherwise changed by the County. In the event that the County finds it necessary to change any of the specific dates and times in the calendar of events listed below, it will do so by issuing an addendum to this RFP and posting such addendum on the Dane County [website](#). There may or may not be a formal notification issued for changes in the estimated dates and times.

DATE	EVENT
January 12, 2022	RFP Issued
February 24, 2022	Last day to submit written inquiries (2:00 p.m. CST)
February 28, 2022	Addendums or supplements to the RFP posted on the Purchasing Division website
February 3, 2022	Vendor Conference
March 16, 2022	Proposals due (2:00 p.m. CST)
April 2022	Interviews (if needed)
April 2022	Vendor Selection/Award

1.5 Evaluation Criteria

The proposals will be scored using the following criteria:

Proposal Requirements	Percent
Organizational Capabilities (Section 3.4)	15%
Staff Capabilities (Section 3.5)	20%
Meeting Facilitation (Section 3.6)	20%
Project Plan & Timeline (Section 3.7)	20%
Cost	Percent
Cost (Section 5)	25%
Total	100%

1.6 Submittal Instructions

Proposals must be received in the Purchasing – Bid Dropbox located on the www.danepurchasing.com website no later than the date and time indicated within the RFP Deadline field on the RFP Cover Page or addenda. Late, faxed, mailed, hand-delivered, or unsigned proposals will be rejected unless otherwise specified. Dane County is not liable for any cost incurred by proposers in replying to this RFP.

All proposals must be saved in PDF format unless otherwise specified within the RFP document and the file name shall include the RFP# and name of business submitting proposal.

Example of how to name the files:

120012 – Vendor Name – RFP Response

120012 – Vendor Name – Cost Proposal

To Submit a Proposal:

1. Go to www.danepurchasing.com and click on Purchasing – Bid Dropbox or click on the Open RFP’s and Bids page link.
2. Click on the Submit a Bid button within the green Purchasing Bid Dropbox.

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3. Type in the Email, First Name, Last Name and Company information and click Continue.
4. Drag and drop the RFP files one at a time into the “Drag files here” box.
5. After all files have been placed into the “Drag files here” box, click on the blue Upload button.
 - a. The file upload status can be seen for each document uploaded.
 - b. After each document reaches 100%, it will say “Uploaded”.
6. Confirm all files have been uploaded and then close out of the window.

2.0 PROJECT OVERVIEW AND SCOPE OF SERVICES

2.1 **Definitions and Links**

The following definitions and links are used throughout the RFP.

County: Dane County

County Agency: Department/Division utilizing the service or product.

Dane County Purchasing website: www.danepurchasing.com

Fair Labor Practices websites: www.nlr.gov and <http://werc.wi.gov>

Purchasing

Proposer/Vendor/Firm/Contractor: a company submitting a proposal in response to this RFP.

2.2 **Scope of Services/Specification Overview**

A. **PROJECT OVERVIEW**

Introduction

Dane County is seeking a qualified consultant to lead the development of the Dane County Regional Housing Strategy (RHS), a strategic planning guide for meeting the county's future housing needs over the next 10-20 years.

The RHS will include a regional housing study, as well as an inventory and assessment of programs, resources and land use tools currently used to develop and preserve affordable-workforce housing in Dane County. Work on the RHS will be overseen by an Advisory Committee comprised of elected officials, and representatives from area school districts, private sector business, housing stakeholders, utilities, and other key regional stakeholders.

To assist the lead RHS consultants, the County also seeks a meeting facilitation expert (subcontractor) to design the meeting process, and to facilitate the RHS meetings in cooperation with the lead consultants. The strategy and process should be inclusive of underrepresented groups including but not limited to people of color, women, seniors, disabled, and youth. The RHS will be developed over the course of approximately eight to ten meetings with the RHS Advisory Committee.

The RHS may include a county-wide survey or other community feedback process to gain input on the Regional Housing Strategy.

Regional Housing Strategy Background

Dane County is the fastest growing county in WI, with a current population of 561,504. Since 2010, Dane County added 74,431 residents and 26,546 households, which accounts for 40% of Wisconsin's overall population growth. The City of Madison, the county's largest city has 269,840 residents. An estimated 104,566 workers commute into Dane County each day. Dane County contains eight cities, 20 villages, and 33 towns. The majority of towns are rural and highly agricultural, and many fall under the county zoning ordinance.

Between 2006-2017, Dane County under-produced more than 11,000 housing units relative to household growth. Currently, there are 20,835 renter households and 7,790 homeowners who are extremely cost-burdened, paying more than fifty-percent of their

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monthly income on housing. These numbers reflect a 26.9 percent increase from the previous reporting period in 2010,¹ and will likely grow due to the pandemic.

In addition, between 2010 and 2017, the homeownership gap between white households and those owned by people of color increased from 28.1 to 30.1 percentage points nationwide.² In 2018, the Dane County homeownership gap was even higher with the homeownership rate of white residents at 63.3 percent, more than twice as high than homeownership rate of 29.7 percent for people of color.³

In 2015, when the [Dane County Housing Initiative](#) (DCHI) started, there were three municipalities engaged in affordable housing; now there are fourteen. There are nine Dane County municipalities that have a housing task force or a recent housing study, and four more that have recently pursued affordable/workforce housing development projects.

Please note that the work of DCHI, which the RHS is an outgrowth of, has primarily concentrated on engagement with municipalities outside of the City of Madison because the city has been working on this issue much longer and does not need support from DCHI. Madison will, however, be participating in the RHS process.

Other reports that RHS acknowledges include the 2015 and 2019 [County Housing Needs Assessment](#), the [Valuing Daycare Proximity to Affordable Housing](#), the [Dane County Climate Action Plan](#), the [City of Madison Housing Forward](#) and [Housing Snapshot](#), [Connect Greater Madison 2050 Plan](#), and the [Regional Development Framework](#).

Purpose and Goals

The Dane County Regional Housing Strategy is meant to, 1) capture the interest and momentum of the stakeholders and municipalities, 2) recognize and build on current efforts, not duplicate them, 3) acknowledge that each municipality has a different size, capacity, needs, and level of interest, and should have a voice at the table.

The overall goal of the RHS is to expedite the development and preservation of affordable-workforce housing in Dane County. Recognition of the value in regional collaboration, across municipalities, agencies, organizations, and between the public-private sectors is also key priority of the RHS.

The RHS is not intended to result in a plan that will tell individual local municipalities what to do. Rather, the RHS is a strategic planning process that will bring municipalities and housing stakeholders together for the first time to better understand not only the housing shortage, but also the regional nature of housing, and an opportunity for new solutions. The RHS can also be understood as two parts education and capacity building, and one part relationship building.

¹ Dane County Housing Needs Assessment, 2019 Update. Paulsen, Kurt.

² Explaining the Black-White Homeownership Urban Gap Report, Urban Institute. Choi, Jung Hyun et. al. 2019.

³ American Community Survey, 2018. US Census, table S2502.

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B. **SCOPE OF SERVICES**

The lead planning consultant shall be responsible for developing the Dane County Regional Housing Strategy with the assistance of the meeting facilitator, and in conjunction with the Regional Housing Strategy Advisory Committee (approximately 50-55 members). The following is a list of core components of the RHS that shall be included in the RHS. The county will rely on the consultants' expertise to determine how to conduct these, the order, or if there are other activities or processes that would help to facilitate or produce a more successful outcome.

The core elements of the RHS are:

- Meeting facilitation
- Project Introduction
- Program Inventory and Assessment (PIRA)
- Regional Housing Study
- Vision for Housing
- Housing Strategies and Next Steps
- Future of Housing Guide

Meetings and analyses shall be conducted with a racial, gender, age and ability lens to ensure that all residents are taken into account. For example, data should be disaggregated and reported on by race, gender, age and ability, where possible. Voices of the underrepresented should be heard. The Dane County Planning and Development Department has a [Racial and Gender Equity and Inclusion Plan](#). Each department in Dane Housing also has an equity plan. The City of Madison Fair Housing Equity Assessment (FHEA) can be found [here](#). The Geography of Opportunity, a county-wide FHEA can be found [here](#).

1) **Meeting facilitation**

The meeting facilitation expert will work together with the lead consultant to design and facilitate a meeting process that:

- Establishes a clear understanding of the extent of the housing shortage - who needs housing and who benefits from increasing the affordable/workforce housing supply
- Creates a comfortable, interactive and dynamic learning environment where all Advisory Committee members feel included and have a voice at the table
- Utilizes different types and styles of facilitation exercises (getting participants off their feet, or the use of games is also acceptable)
- Emphasizes relationship and team building, and thinking like a region, and
- Encourages creative and innovative thinking, brainstorming, and solutions

2) **Project Introduction**

The purpose of the introduction is to provide a regional context for the RHS process, and ensure Advisory Committee members have a shared understanding of who we are, what affordable housing is, and any key regional trends that would help provide context for the RHS process.

At a minimum, the introduction should answer the following questions:

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- Who are we? Provide demographic profile of Dane County residents over time that includes age, race, gender, income, household size, composition, first generation residents, English as a second language; workforce/commuter profile, and overview of major land use and transportation trends, and other key indicators.
- What is affordable/workforce housing? What does it look like?
- Who needs affordable/workforce housing?
- Who else needs/benefits affordable/workforce housing? For example municipalities, school districts, public safety, child and senior care providers, private sector small business, retail food sector, and major employers, etc. How do they benefit?
- What are the benefits and drawbacks of affordable/workforce housing? Does new affordable multi-family housing cause the value of your home to go down?

3) Program Inventory and Assessment (PIRA)*

The purpose of the PIRA is to gain a better understanding of the tools, programs, policies and resources being used by cities and villages to bring forward or preserve affordable-workforce housing for households making up to 60% AMI, up to 80% AMI; and for households making 81%-120% AMI. Provide examples of how the tools, programs, policies and resources are being used and what the results have been. Provide an inventory of other resources, tools, programming, financing, and/or policies that are being utilized at the local, state, or federal level.

The PIRA shall conduct an inventory and assessment of the current programs, policies and resources being used by municipalities to facilitate the development and preservation of affordable-workforce housing, including, but not limited to public policies; land use regulations such as subdivision and zoning ordinances; comprehensive plans; rehabilitation and retrofitting energy upgrades efforts; land banking; MF allowances; down payment assistance; financial sources including TIF, TID closure funding, grants, and incentives; housing task forces or committees and reports; housing plans; alternative housing types such as Habitat for Humanity, land trust, ADU's, co-housing, cooperative housing, tiny housing, pocket neighborhood, etc. Examples and a summary of results shall be provided. Also, a question in the inventory survey that would help determine if communities are pursuing strategies or policies that limit the impact housing has on climate change shall be included..

*Results of the PIRA shall be separated and reported on whether the policy, program or tool, etc. is meant to develop / preserve affordable-workforce housing, for households making up to 60% AMI, and 61%-80% AMI, compared with the tools, policies and programs whose purpose it is to reduce housing costs and help to develop / preserve housing options for households making 81%-120% AMI.

4) Regional Housing Study

The purpose of the housing study is to analyze the housing stock and housing market in Dane County, and identify gaps and/or trends in the housing market over time that will help to identify strategies to close the housing gap for households at <30%, 31-50%, 51-60%, 61-80%, and 81%-120% AMI.

The Regional a Housing Study shall include the following:

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a. Population and Demographic Profile

An analysis of the demographic characteristics of Dane County through 2040, and 2050 that includes but is not limited to the following:

- Population – Existing estimates broken down by income (extremely low <30%, 31-50%, 51-60%, 61-80%, 81%-120% AMI)
- Households, including cost-burdened and extremely cost-burdened, and renter and owner households by income
- Age, race, gender – broken down by income and housing type
- Ethnicity by income and housing type
- Household composition or those with a disability by income type
- Occupation and wage profile over time, including highest demand LMI jobs, sectors
- Other data deemed necessary by the consultant

b. Housing Stock Inventory

An analysis of the location, quantity, quality, and occupancy of various housing types, sizes, tenures and price points in Dane County, by municipality, including, but not limited to:

- Housing units by structure type tenure including # of units per building and # of bedrooms per unit
- Renter and owner occupied housing
- Assisted/subsidized housing
- Senior housing
- Affordable/workforce housing
- Group quarters
- Loss of housing stock
- Other housing data deemed necessary by consultant

c. Market Analysis

An analysis of the existing and future supply and demand for housing by price/rent levels, unit types and tenure (ownership/rental) by municipality including but not limited to:

- Property sales data (rental and single family)
- Average market value by unit type
- Sales and turnover rate for all housing types
- Vacancy data for all rental units
- Owner occupied vs. rental (rental and single family) over time
- Analysis of anticipated job growth, employment categories and wages, and unemployment rates
- Commute and employment data for residents who work in Dane County including travel time/distance to jobs
- Analysis of existing transportation options and impact on housing
- Other housing data deemed necessary by consultant

d. Housing Needs Assessment

An analysis of the results of the demographic study, housing inventory and market analysis conducted above to determine what deficiencies and surpluses of housing

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units exist for renter and owner households of various sizes, incomes within the stated ranges, types and tenure by municipality. This supply gap analysis will help identify housing needs in Dane County and aid in efforts to develop and prioritize strategies to address these needs. The goal is to provide an estimate of the number of housing units needed (both rental and for sale) to meet the existing and future needs of the county based on unit type, number of bedrooms, price point, and location in relation to LMI income levels previously defined, and age categories, by municipality.

A report of the housing supply gap analysis is required and shall be divided into three distinct sections to ensure that the Advisory Committee members are very clear about the difference between affordable-workforce housing that is below <30%, 31-50%, 51-60%, 61%- 80% AMI, housing that is 81%-120 AMI and housing for those who are most vulnerable:

1. <30%, 31-50%, 51-60%,
2. 61-80%
3. 81%-120% AMI

e. Housing Instability

Measurement of the current housing instability gap for current LMI households, by household size, composition, age, race, gender, ability. Housing instability is defined as LMI households (up to 80%), that are paying more than 30% and up to 50% of their income on housing, that lack reasonable access, within a quarter-mile, to basic services such as food, transportation, childcare, employment, schools, and health care.

Questions to be considered:

- Are there strategies to reduce housing instability? Include a geospatial analysis.
- Are there any strategies to reduce housing instability?

f. Race, Gender, Family

A summary profile of owned and rented households for people of color and women by type of unit, tenure, # of bedrooms, rent vs. single family by income category, by municipality.

Questions to be considered:

- What are some examples or strategies that can reduce disparities in homeownership and rental housing for people of color?
- Are there any factors in housing that should be considered or taken into account for women, in particular, due to the majority of single parent households being headed by women, women on average live longer, have lower lifetime earnings, and are more likely to be a victim of domestic violence or sexual assault?
- How can housing be safer for women?

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- Can housing better accommodate children and families?

g. Economic Development

Questions to be considered:

- What is the economic impact of the development of a 50 unit multi-family development? Provide a brief overview.

h. Fair Share or Regional Balance

An analysis that shows the percent of the county's housing units within each municipality, the percent of the county's low-income and extremely low-income renters within each municipality, and the distribution of households making more than 100 percent AMI by municipality.

5) Vision for the Future of Housing in Dane County

Based on the results of the PIRA and housing study, a value based approach shall be used that recognizes the interdependence and regional nature of housing and the intersection of housing, food, jobs, transportation and child care, and work with the Advisory Committee to create a vision for the future of housing in Dane County for the next 10-20 years.

6) Regional Housing Strategies

Based on the results of the PIRA (strengths, assets), housing study and a vision for the future of housing in Dane County, and in coordination with the consultants, the RHS Advisory Committee shall identify the top challenges or obstacles preventing affordable-workforce housing development and preservation. Following the review of challenges or issues, the Advisory Committee will work with the consultants to identify opportunities or strategies that build on or expand current efforts, identify gaps in information or programs, and articulate new strategies. Strategies may refer to municipalities, but should be primarily regional in nature. Particular attention shall be paid to partnership or collaboration opportunities, and strategies stakeholders and municipalities can work on and towards together as a region. Strategies shall also take into consideration the connection between affordable housing, transportation, child care, employment and food and with a lens of racial, gender equity, sustainability, and climate change. Strategies shall take into consideration the perspective of not only cities and villages, but towns as well. Strategy discussions and brainstorming sessions shall be inclusive of all underrepresented groups.

Next Steps

RHS strategies shall focus on the next 3-5 years, and include next steps to achieve and evaluate the strategies, as well as expected outcomes.

7) Dane County Regional Housing Strategy Guide Report Requirements

The Regional Housing Strategy Guide shall be a report that includes results from the PIRA, housing study, visioning, strategy recommendations and next steps, and include

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an executive summary. The results shall be presented in a written report containing appropriate maps, graphs, charts and tables necessary to summarize the data and findings. The report shall be formatted in a manner conducive to publishing online. All maps and spatial data shall be provided in a format acceptable for the county's GIS staff. Materials shall be provided in draft form to the County for review prior to finalization.

Data and presentations developed as part of the guide shall be made available in print and online as part of the Regional Housing Strategy Guide report.

Additional Requirements

Advisory Committee Meetings

The RHS process shall include monthly meetings with the RHS Advisory Committee. A slide deck will be made available to meeting participants prior to each meeting. Each session shall begin with an explanation of the meeting purpose and an overview of the meeting activities. The PPT presentations shall be presented in a clear and easy to understand format.

Meetings, Communication and Logistics

Monthly project team meetings with the consultants and Dane County staff shall be held between each RHS Advisory Committee meeting to ensure a successful process and timeline of deliverable. The meetings shall be organized/facilitated by consultants. Each RHS meeting shall be videotaped and a link of the video made available publicly between each meeting.

Dane County Staff Involvement and Responsibilities

Dane County Planning and Development staff shall develop the RHS website, convene the RHS Advisory Committee for each monthly meeting, and be responsible for the communications plan. County staff can also provide GIS support. UW Extension staff may be available to assist with community engagement or public involvement processes should these be included in the RHS.

Timeline

Anticipated start date late spring 2022.

3.0 RFP RESPONSE PREPARATION REQUIREMENTS

Proposals shall be labelled “**Dane County Regional Housing Strategy: Taking the Next Step**”. Proposals shall be organized to comply with the section numbers and names as shown below. Each section heading should be clearly marked. Graphics may be included. The RFP sections which should be submitted/responded to are:

3.1 [Attachment A – Vendor Information](#)

3.2 Table of Contents

Provide a table of contents that, at a minimum, includes all of the sections as identified below. Listings of sub-sections and graphics/tables also may be included. Section dividers are encouraged.

3.3 Overview:

Provide a one-page overview of the firm’s interest in leading in the development of the Dane County’s Regional Housing Strategy. Provide a brief statement demonstrating the firms understanding of the project and the desired outcomes and work products.

3.4 Organization Capabilities

Describe the firm’s experience and capabilities in providing similar services to those required. Provide a description of similar project experience and links to, or copies of associated work products.

3.5 Staff Qualifications

Provide resumes describing the educational and work experiences for each of the key staff, including sub-consultants, who would be assigned to the project. Dane County expects a single project manager to be assigned to the project for the duration. Please identify the project manager. Include a brief statement of the availability of key assigned personnel to the team.

3.6 Meeting Facilitation

Provide narrative regarding the firm’s approach to meeting facilitation, including a description of the meeting design, examples of meeting facilitation exercises and participant engagement strategies, as well as a meeting outline description.

3.7 Project Plan

Provide narrative regarding the firm’s approach to facilitating a planning process for the Dane County Regional Housing Strategy. The proposer shall include in their approach to this project their plan for each of the project components described in section 2.2 including:

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- A description of the technical approach to the project, an outline of the sequence of tasks, and major benchmarks.
- Description of what the final report and the Future of Housing Guide will include addressing, at a minimum, the specific components noted in this RFP.
- Proposed use of County staff or other resources

3.8 **Project Timeline**

Present a realistic timeline for this project's completion from the time a contract is awarded. Please provide range estimates for each designated activity in the project.

3.9 **References:**

Proposer must include in their RFPs a list of organizations, including points of contact (name, address, and telephone number), which can be used as reference for work performed in the area of service required. Selected organizations may be contacted to determine the quality of work performed and personnel assigned to the project.