

**REQUEST FOR PROPOSALS**  
UNDERHILL HOUSING NEEDS ASSESSMENT  
Town of Underhill  
February 13, 2020

**PROJECT SUMMARY**

The Town of Underhill was awarded a municipal planning grant to conduct a housing needs assessment that is expected to focus on affordable housing opportunities in Underhill. Like most of the municipalities in Chittenden County, affordable housing opportunities in Underhill are limited, and as a result, the Town of Underhill wishes to assess the community's current and projected housing needs (both rental and owner occupied), as well as the community's current, projected and required inventory – especially in regards to meeting the identified projected housing needs. The Town will then seek guidance on how to effectively address the community's housing needs, particularly with respect to affordable housing, in the short term, as well as the long term.

**CONTEXT AND BACKGROUND**

Underhill's Municipal Plan documents the community's desire to make residences in Underhill available to all income levels and to make housing affordable for all residents, while at the same time, maintaining the Town's rural character. As part of the 2020 Town Plan drafting process, the Planning Commission received feed from a community-wide survey for the drafting of the forthcoming, as well as hosting four community forums. The input included feedback about addressing the need for more affordable housing for all income levels as well as for seniors.

Recent data from the Vermont Agency of Commerce and Community Development, as well as the Vermont Housing Financial Agency portrays a growing trend in Underhill where the median home price in the Town is significantly increasing, while at the same time, the median household income is only showing modest growth. As a result, the data suggests that the housing stock in Underhill is becoming increasingly unaffordable for median and low-income residents. Additionally, renters and potential renters in Underhill are further burdened by the lack of supply.

Due to the lack of affordable housing options, growth potential is likely limited and potentially forcing families and low-income households to seek housing options in other local communities or out of State. Many of those who do reside in Underhill are nonetheless cost-burdened, which minimizes their impact on the local and regional economy by reducing their disposable income. Additionally, 15% of Underhill's households are aged 65 or older, and while a large number of these households are not cost burdened, these landowners sometimes lack the physical ability to maintain their rural properties and suffer from isolation from the services they need.

Residents and community leaders alike are concerned about both retaining these seniors as citizens of Underhill, while at the same time, facilitating the best use of their properties in the interest of preserving their value. With all of the aforementioned factors taken into consideration, the goal of this project is to gather the necessary information that will help Underhill understand the need for affordable housing in the community, as well as to create recommendations on how to implement the noted observations and suggested plan of actions. The selected consultant should take into consideration the Town's desire to maintain its rural character, which is essential to the community at large. Additionally, the recommendations provided should be consistent with the Town's actions it has taken in the past two years of trying to encouraging denser development towards the Town's two village centers – Underhill Flats Village Center and Underhill Center Village (both have village designations by the Vermont Department of Housing & Community Development).

## **SUPPORTING DOCUMENTS**

This housing needs assessment will be Underhill's first housing assessment, and therefore, there are no direct municipal documents relating to housing needs available. However, the study shall build upon and/or the relevant existing planning materials, such as:

- Underhill's 2015 Town Plan, and once adopted, Underhill's 2020 Town Plan;
- Chittenden County's Housing Needs Assessment (2014);
- Chittenden County's ECOS Regional Plan (2018)
- Vermont's Statewide Housing Needs Assessment (Revised Feb. 2015)

## **PROJECT DELIVERABLES**

The consultant selected to complete the housing needs assessment is free to develop a specific methodology as it deems appropriate so long as the finished product satisfies the data/document requests identified below. The data is expected to be clearly presented and understandable for all audiences.

### Data/Document Requests

- A. An Executive summary describing the findings
- B. Anticipated data collection:
  1. Current inventory
    - i. Long-term rentals (number of units, bedroom, and if possible, monthly rent)
    - ii. Short-term rentals (number of units, bedroom, and if possible, monthly rent)
    - iii. Owner-occupied (number of properties, units and assessed value)
    - iv. Other dwelling unit types (i.e. assisted living, senior housing, etc.)
    - v. Vacancy rates (if possible)
  2. Demographics
    - i. Current demographics
    - ii. Future demographics
    - iii. Household information relating to income, age and family size
    - iv. Distribution of families with school-aged children
  3. Commuting patterns
    - i. Locations of where Underhill residents work
  4. Potential areas for development
    - i. Areas for multi-unit housing
    - ii. Areas for senior/assisted living options
    - iii. Areas for special needs housing
  5. Other
    - i. Why residents choose to live in Underhill
    - ii. Why people may choose not to buy in Underhill
    - iii. Characterizations of those who buy in Underhill (e.g. age, education, income, family size, employment status, etc.)
    - iv. Characterizations of those who rent in Underhill (e.g. age, education, income, family size, employment status, etc.)
    - v. How will demographic trends affect the future of Underhill's housing supply
    - vi. What types of housing will best achieve the goal of providing affordable housing while at the same time maintaining the Town's rural character
- C. Data analysis:

1. Rental market analysis
  2. Senior and family market analysis
  3. Short-term rental market analysis
  4. Current and future housing affordability analysis
  5. Short-term and long-term housing needs
  6. Other areas determined by the consultant that will allow Underhill to fully understand the housing needs in the community
- D. Expectations for recommended implementation measures:
1. Strategies to overcome the identified factors that restrict affordable housing opportunities in Underhill while maintaining the Town's rural character;
  2. Short-term and long-term strategies on how to encourage affordable housing for both renters and owner occupied residents while maintaining the Town's rural character; and
  3. Identification of potential areas that maintains the Town's rural character for new affordable housing development.

#### **COMMUNITY SUPPORT**

As part of this proposal, the consultant may suggest opportunities for community members and groups to gather information and provide assistance.

#### **WORK PLAN**

The selected consultant is expected to work with the Town's Planning Commission and Staff throughout the project. The consultant is encouraged to expand upon the descriptions above and suggest alternative approaches that may better achieve the Town's objectives provided throughout this Request for Proposal. The general scope of the project is outlined below (which considers miscellaneous costs, such as travel, printing, etc.); however, the Town is open to recommended amendments:

1. **Kickoff Meeting.** This meeting will be held with the Selected Consultant, Planning Commission and Planning Staff, and will address project expectations and answer any and all outstanding questions.
2. **Data Gathering, Analysis and report.** The consultant, in collaboration with Town Staff where appropriate will gather the necessary data to address the aforementioned items. Data collection can include public outreach means should the consultant determine that this method is necessary. Subsequently, the consultant will analyze the data and begin to develop the report based on the relevant information.
3. **Assessment.** The consultant will perform an assessment of recommended implementation measures above, and if time permits, two of the recommended implementation measures.
4. **Draft Report.** The consultant will develop a draft report and present the findings to the Planning Commission.
5. **Feedback.** The consultant, after presenting the draft report to the Planning Commission, will incorporate comments into the Final Report.
6. **Final Report (PC).** The consultant will present their final report to the Planning Commission.
7. **Final Report (SB).** The consultant will present their final report to the Selectboard.

The final product is expected to be delivered digitally and as a hard copy. In regards to the digital copy, the final product is expected to be internet-ready and delivered electronically in a format (or formats) mutually agreed upon by the consultant and the Town that will allow for modifications,

reproduction and amendments to the document(s) generated throughout the process of the project and thereafter by the Town and others. The consultant will be expected to provide all graphics and illustration to be included in the Housing Needs Assessment, as well as any hand-outs used in public meetings in both “hard copy” and electronic form. The Town of Underhill retains ownership of all data, reports, drafts and any other submitted documentation.

#### **PROJECT TIMELINE**

Proposals shall contain an anticipated timeline of the project’s deliverables outlined above. The project is to be completed by February 28, 2021.

#### **COMPENSATION AND CONTRACT REQUIREMENTS**

The contract for the proposed work shall not exceed a maximum of \$12,550 for project completion, including all expenses. Additionally, the consultant contract will be subject to the terms of the Attachment D of the Municipal Planning Grant Agreement (Procurement Procedures and Other Grant Requirements).

#### **PROPOSAL REQUIREMENTS**

All responses to the RFP shall include the following information:

1. **Cover Letter** – a letter of interest and summary of qualifications, recommended approaches, scope of work, processes and deliverables for the project.
2. **Scope of Work** – a detailed scope of work based on the work plan provided above, broken down by task. Please describe the approach that will be taken, as well as the methodology. Each task should be detailed and identify which team member will be carrying out the task. The scope of work should also detail the proposed deliverables.

*Note:* The consultant may also propose additional supplemental items to the scope of work or any amendments to the work plan, so long as the supplements and/or amendments conform with the requirements of this RFP and the Municipal Planning Grant.

3. **Proposed Schedule** – Provide a schedule that includes completion of work tasks and deliverables. The schedule should include key meetings and complies with the timeframe provided above.
4. **Project Budget/Cost Proposal** – Provide a detailed budget/cost proposal broken down by task and team member. The overall cost shall not exceed the \$12,550. Please include the overhead costs and hourly rates for those individuals involved.
5. **Qualifications and Staffing** – Provide a qualifications profile of the lead consultant and subconsultants (if applicable), include the identification of the lead consultant, the role of each consultant on the team with organization staffing chart and percentage of time devote to the project of each consultant. Also, please provide detailed information of each subconsultant, including contact information, the name of the firm, year established, including a description of relevant experience on similar projects for each firm and listing of their individual work experience in this role on similar projects.
6. **Example(s) of Similar Work** – If applicable, please provide an example of a similar project.
7. **References** – A minimum of two (2) professional references for whom a similar project has been completed within the last ten (10) years.
8. **Page Limit** – The proposal, encompassing items 1-5 & 7 above shall not exceed 15 double-side page (30 total pages), including cover letter, table of contents, project lists and contracts.

One (1) adobe acrobat (pdf) version and five (5) reproducible hard copies shall be submitted to the Town of Underhill by February 28, 2021. All information submitted becomes the property of the Town of Underhill upon submission. The Town reserves the right to issue supplemental information or guidelines relating to the RFP, as well as to make modifications to the RFP or withdraw the RFP. Once submitted, the consultant team may not be changed without written notice to and consent of the Town. The cost of preparing, submitting and presenting a proposal is the sole expense of the consultant. The Town reserves the right to reject any and all proposals received as a result of this solicitation, to negotiate with any qualified source, to waive any formality and any technicalities or to cancel the RFP in part or in its entirety if it is in the best interest of the Town. This solicitation of proposals in no way obligates the Town to award a contract.

**MUNICIPALITY/LOCAL PROJECT MANAGER CONTACT INFORMATION**

Town of Underhill  
Attn: Andrew Strniste  
Planning Director & Zoning Administrator  
P.O. Box 120  
Underhill, VT 05489

[astrniste@underhillvt.gov](mailto:astrniste@underhillvt.gov)

If you have any questions about this project or the RFP, please address them in writing via email to Andrew Strniste no later than 5 days prior to the date that proposals are due. Both the question and response may be shared with the other consultants known to be interested in submitting a proposal if the question involves substantive information about the project or RFP.

**RFP SCHEDULE SUMMARY**

Proposals due: March 9, 2020 @ 12:00 PM  
Interviews (optional): March 16, 2020 to March 20, 2020  
Consultant Selection: Late March 2020 to Early April 2020  
Project Commences: Date the Contract is Awarded  
Completion of Project: February 28, 2021

**PROPOSAL SELECTION**

Proposals will be reviewed by a selection committee comprised of representatives from the Town of Underhill and the Underhill Planning Commission. The chosen consultant will be recommended for approval by the Selectboard. A short-list of consultants may be selected for interviews.

**PROPOSAL EVALUATION**

Proposals will be evaluated based on the following nonexclusive criteria:

- Clarity of presentation
- Understanding of the scope of work and responsiveness to the RFP
- Identification of sources for data collection
- Technical approach to the project
- Public participation methods
- Professional qualifications and experience of key personnel
- Current workload and availability of necessary personnel.

- Relevant experience related to the subject of the project (housing needs assessments)
- Successful past performance by the respondent on similar projects
- Ability to meet the timeline's deadlines
- Amount of work to be accomplished within the allotted budgeted amount
- Other factors deemed relevant

#### **INTERVIEW FRAMEWORK (OPTIONAL)**

The Town of Underhill reserves the right to select the top tier of consultants and invite them for an interview prior to awarding the contract. In this process, the selection committee may ask the respondents to give an oral presentation of their respective proposals. The purpose of the presentation is to provide additional information about qualifications, experience in performing similar services, and an opportunity for the consultant to clarify or elaborate about their proposal. In addition, the review committee would be afforded the opportunity to ask questions that would be influential in their decision. If interviews are to be conducted, they will be held at the Town Offices at 12 Pleasant Valley Road, Underhill, Vermont. All costs and expenses incurred in traveling for the purpose of interviewing and presenting shall be the responsibility of the consultant.

#### **FINAL CONSULTANT SELECTION**

Following the selection process, one consultant or consultant team will be selected to negotiate a final contract for services. The final scope of work with specified deliverables may be modified through negotiation of the final contract. The final project team may also be modified through negotiation of the final contract. Any expenses resulting from the interview and proposal process will be the sole responsibility of the consultant.