Overview
The Community Planning Association of Southwest Idaho (COMPASS) is seeking proposals from firms to develop a Regional Housing Coordination Plan for Ada and Canyon Counties, Idaho.

Regional Housing Coordination Plan
COMPASS seeks to develop a Regional Housing Coordination Plan (RHCP) to better integrate housing with transportation infrastructure and produce an action plan to improve affordable housing availability in Ada and Canyon Counties. The area has experienced rapid population growth, with the two counties growing by 16.8% over the last five years. The City of Meridian alone (the second largest city in the region) grew by 35.8%. This dramatic growth has increased demand for housing, pushing prices higher. However, production of affordable housing has not kept pace, leading to a lack of suitable housing for low and moderate-income households. The main goal of the RHCP is to identify feasible policies, strategies, and tools to meet demands and promote more housing options for current and future residents.

COMPASS is the metropolitan planning organization (MPO) for Ada and Canyon Counties. As such, the agency is interested in affordable housing solutions that consider the interrelatedness of multimodal transportation and housing in policies, strategies, and tools. COMPASS does not directly produce or control housing; however, COMPASS and its member agencies are involved in developing policies, codes, infrastructure, and programs that influence the housing market. The RHCP should consider the various roles, responsibilities, and characteristics of each member agency and partnering organization.

Through the RHCP, COMPASS aims to leverage tools to encourage more housing options for households earning up to 120% of median income levels (approximately $80,000 per year). To accomplish this, the RHCP should include an assessment of current housing conditions based on data provided by COMPASS, a market analysis of housing gaps, approaches to mitigate these gaps evaluated through stakeholder and public outreach processes, and an action plan to identify necessary steps to implement the proposed solutions.

This is a planning and policy effort only; funding is not to be used for the development or construction of affordable housing projects.
Relationship with other efforts

Communities in Motion 2050 (CIM 2050), the regional long-range transportation plan for Ada and Canyon Counties, is anticipated to be adopted in December 2022. The RHCP will help fulfill the CIM 2050 “Housing and Affordability” objective, which states that COMPASS and member agencies should “promote development patterns and a transportation system that provide for affordable housing and transportation options for all residents.” Recommended policies, strategies, and tools should consider the relationship to CIM 2050 plan and other relevant local plans.

Proposals

The budget for the RHCP is $100,000. Interested firms must demonstrate knowledge and experience in developing RHCPs that integrate housing, economic development, and transportation into a unified vision and action plan. All deliverables are expected to be completed no later than September 30, 2023. Proposals will be evaluated based on their ability to meet the qualifications and selection criteria.

Proposals must be prepared and submitted in accordance with the guidelines and requirements outlined in this Request for Proposals (RFP).

Planning area

The planning area encompasses two counties and 14 cities, ranging from the very small (less than 1,000 population) to the three largest cities in the state (see map on following page). While the demographic and housing characteristics of communities in the region vary, a coordinated approach to affordable housing is needed to ensure that policies, strategies, and tools benefit each community and the region as a whole.
Proposed Project Framework

Oversight

COMPASS is responsible for this study. Representatives of the COMPASS Affordable Housing Advisory Workgroup will act as the steering committee for this effort as deemed appropriate by the project manager. The steering committee is made up of local jurisdictions and partner agencies and will be convened prior to the project kick-off. Additional, relevant stakeholders will be identified and included in the steering committee as appropriate. Other stakeholders should also be invited to participate in developing the RHCP during the stakeholder outreach phase of this project.

The consultant will work closely with COMPASS and the steering committee to ensure timely delivery and adoption of the RHCP. Proposals should recommend a meeting schedule anticipated for the COMPASS steering committee and expectations for partnering agencies and staff. Meetings are expected to be virtual or a hybrid of in-person and virtual, pending meeting content and public health conditions.

Deliverables (See Attachment 1 for more information)

1. Final workplan
2. Project management progress reports
3. Housing market analysis, forecast, and needs report
4. Stakeholder inventory
5. Policy analysis and recommendations report
6. Stakeholder outreach and public engagement
7. Outreach report
Submittal Requirements

Minimum components of a responsive submittal include the following:

1. Cover letter with a brief narrative describing:
   a. respondent's understanding of the project.
   b. project manager and/or point of contact for the team.
   c. a brief description of the firm(s) that constitute the team, their areas of expertise and role on the project team.

2. Consultant qualifications including:
   a. a statement of consultants' understanding that demonstrates knowledge of the project requirements.
   b. an overview of the firm and its ability to service the project needs.
   c. a list of three relevant project-specific references, and the team members' role in these projects, including a brief description of the services provided and client contact information.
   d. a brief summary of key staff on the project team, including a single designated point of contact for project coordination. Full resumes shall be included as an appendix. For each key staff member identified, provide an estimate of their commitment to the project, including anticipated percent of time or average weekly hours dedicated to project tasks. Principals of the involved firm(s) may be listed, but only in the context of their anticipated level of involvement in the project.

3. Proposed work plan including:
   a. a description of the consultant’s approach to the project, including interim deliverables, major benchmarks, milestone dates and outreach strategy.
   b. a budget. Include task-level cost estimates with line-item estimates for major sub-tasks. Optional tasks will be clearly identified with associated costs.
   c. a schedule of tasks for the duration of the project, including the 'level of effort' listed by task and anticipated team member. Project completion shall be no later than September 30, 2023.
   d. other project elements as described in Attachment 1.

4. Statement that all firms included on the team are not barred from federal contracts. Can be included as an affirmative acknowledgement in the cover letter.

5. Statement that the sample Professional Services Agreement (sample included as Attachment 2) has been read, that the proposer will meet the prerequisite insurance requirements, and the proposer, if selected, agrees to the terms and
conditions of the agreement. Can be included as an affirmative acknowledgement in the cover letter.

6. Disadvantaged Business Enterprise (DBE) status (including subcontractors), including name of certifying agency and contact person. Respondents are encouraged to include DBE firms on their teams. The Idaho Transportation Department maintains a list of firms at [https://itd.dbesystem.com/?TN=itd](https://itd.dbesystem.com/?TN=itd).

In addition to the above list, respondents are advised of the following requirements and guidelines:

1. Responses - 12 pages maximum and should include:
   a. Proposal cover and table of contents
   b. Consultant qualifications and sub-consultant descriptions (if applicable)
   c. Three project specific references
   d. Proposed work plan
   e. Budget, including labor hours and cost per task
   f. Note: 12-page maximum excludes cover page, table of contents, consultant resumes, and other appendices.

2. Submit one (1) PDF file of the complete submittal via e-mail to mlarsen@compassidaho.org

3. Proposals must be received before 4:00 pm MDT on Monday, October 10, 2022.

Selection Criteria
The selection committee will be comprised of COMPASS staff and representatives of the steering committee and will evaluate responses to this RFP.

All consultant proposals submitted in response to this request will be screened for completeness before review by the selection committee. The committee will determine, through a screening and review process, which consultants will be invited to make formal presentations and be interviewed by the committee. The selection committee also reserves the right to make a final selection without an interview.

Submitted proposals will be evaluated using the following key criteria:

- **Proposed workplan:** Clarity and thoughtfulness of workplan in accomplishing the objectives of the RHCP. Workplan demonstrates through consideration of project aims within a local context.

- **Team qualifications and experience:** Consultant team demonstrates experience on similar projects and available capacity to take on the project and deliver high quality, innovative, and relevant work.

- **Proposed outreach plan:** Completeness and thoroughness of the outreach plan in addressing the public and stakeholder engagement objectives.

- **Value added:** Submittal thoughtfully identifies opportunities for efficiency in workplan, schedule or budget, and/or highlights opportunities to add value to products at a reasonable cost.
- **References**: Three references from similar projects.

After selection of the most qualified firm, COMPASS will negotiate a final fee for the project based on a detailed scope of service developed by COMPASS and the selected consultant. If COMPASS and that firm are unable to negotiate a contract, negotiations will be terminated with that firm and the next most qualified firm will be selected until a contract has been negotiated with a qualified firm. References will be checked during the negotiation phase of the contract.

**Criteria**
Responses will be scored as follows

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Maximum Points</th>
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<tbody>
<tr>
<td>A. Proposed workplan</td>
<td>35</td>
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<tr>
<td>B. Team qualifications and experience</td>
<td>30</td>
</tr>
<tr>
<td>C. Proposed outreach plan</td>
<td>20</td>
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<tr>
<td>D. Added value</td>
<td>10</td>
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<tr>
<td>E. Proposed price</td>
<td>5</td>
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**Total Points Possible** 100

**Schedule**
COMPASS will be using an RFP process to select a consultant. Interested parties are encouraged to submit questions pertaining to this RFP via e-mail by the end of business Monday October 3, 2022. The proposed schedule is as follows:

<table>
<thead>
<tr>
<th>Date</th>
<th>Schedule Milestone</th>
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<tbody>
<tr>
<td>September 9, 2022</td>
<td>RFP Release and Published Notice</td>
</tr>
<tr>
<td>October 3, 2022</td>
<td>Deadline for Submitting Questions</td>
</tr>
<tr>
<td>October 6, 2022</td>
<td>Response to Questions Posted to COMPASS Website</td>
</tr>
<tr>
<td><strong>October 10, 2022</strong></td>
<td><strong>Proposal Deadline</strong></td>
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<tr>
<td>4:00 PM MDT</td>
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<tr>
<td>October 11-17, 2022</td>
<td>Review and Selection Process</td>
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<tr>
<td>October 18-21, 2022</td>
<td>Interviews Conducted (if needed)</td>
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<tr>
<td>October 27, 2022</td>
<td>Anticipated Notice to Proceed</td>
</tr>
<tr>
<td>July 26, 2023 (tentative)</td>
<td>Findings presented to COMPASS Regional Transportation Advisory Committee</td>
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<tr>
<td>August 21, 2023 (tentative)</td>
<td>Findings presented to COMPASS Board of Directors</td>
</tr>
<tr>
<td>By September 30, 2023</td>
<td>Delivery of final report, tool(s), and data</td>
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In addition to the above, respondents are advised of the following:

- DBE firms and non-profit entities are encouraged to respond.
- COMPASS reserves the right to request additional information from a respondent.
- COMPASS reserves the right to reject any and all responses and waive any irregularities. Issuance of this RFP does not constitute a commitment to proceed to a guaranteed contract.
- Questions and communication regarding the project described in the RFP will be directed solely to Meg Larsen, Director of Operations:
  - No phone call or oral questions will be accepted.
  - Questions on this project must be submitted via e-mail to mlarsen@compassidaho.org and will be accepted until October 3, 2022.
- Firms that may be interested in submitting a response are strongly encouraged to submit their contact information upon receipt of the RFP to be sure they receive relevant updates, if any, to the RFP.
- Responses to questions and additional information will be posted on the COMPASS RFP/RFQ webpage:
  - https://www.compassidaho.org/people/jobs.htm

Additional Information

An example of COMPASS’ standard Professional Service Agreement (PSA) is attached for your information as Attachment 2.
Attachment 1

Regional Housing Coordination Plan

Described below is a preliminary scope of work to provide a general outline for this effort. Consultants may propose an alternative structure to the scope of work if opportunities for improvement are identified. The consultant should provide detailed descriptions of each task, subtasks, and corresponding deliverables.

Phase 0: Workplan

This task outlines the milestones and schedule for this project and should be integrated throughout the process to ensure timely progress and reporting. A monthly progress report should be provided to the COMPASS project manager with the invoice. The progress report should provide information on the work that has been completed during the previous month, next steps, and whether tasks are on schedule and budget.

Deliverables to include:
- Final workplan, including schedule, milestones, and deliverables,
- Monthly project management progress reports.

Phase I: Data Inventory and Market Analysis

COMPASS, member agencies, and other stakeholders already have access to robust demographic and housing data. COMPASS will compile those data and make them available to the consultant in the data inventory and market analysis phase. The consultant should anticipate leveraging these existing data resources to limit expenses. The consultant should compile both regional and subarea data into a data inventory. This data inventory should be more than a recitation of census data.

The market analysis will be an evaluation of regional and subarea demographics and housing characteristics. This analysis should:
- consider the amount, availability, and location of existing housing stock, including naturally occurring affordable housing, accessory dwelling units, and short-term rentals,
- evaluate the housing gap that currently exists, with consideration for the impact on transportation services and income/economic conditions, and
- evaluate future housing needs and gaps. The market analysis should include population projections to forecast demands for various types of housing stock (price, size, density, location, owner/renter, etc.).

This phase will also include the compilation of a stakeholder inventory that captures housing organizations and includes additional details on their roles, service areas, contact information, and other relevant information for the policy analysis in Phase II.

Deliverables to include:
- Regional housing data inventory,
- Housing market analysis and forecast,
- Identified housing needs and gaps,
- Stakeholder inventory.
Phase II: Policy Analysis
This task will build upon the previous task and address the potential policies, strategies, and tools to support the development of affordable housing at the state, regional, county, and local level.

The analysis should:

- review local land use, building, and land development policies, strategies, and tools to determine their impact on the production and retention of affordable housing,
- analyze the local lending and financing environment, to identify any barriers to specific populations, neighborhoods, or housing types that may need to be addressed,
- address current barriers to affordable housing development, highlighting housing demands that will likely not be met without intervention, subsidies, incentives, innovative programs, code revisions, etc., and
- identify priority policies, strategies, and tools to encourage long-term housing affordability. Recommendations should consider the existing politics, infrastructure, and funding mechanisms found in Ada and Canyon Counties and reflect the feasibility of success. Policy recommendations should also consider the local and regional plans, such as land use plans and Communities in Motion 2050.

The policy analysis will be used for Phase III Community Outreach.

Deliverables to include:
- Analysis of current policy framework’s impact on housing affordability,
- Identification of barriers to housing affordability, and
- Recommendation of priority policies, strategies, and tools.

Phase III: Community Outreach
This phase will build upon the market analysis and policy analysis by reaching out and engaging both community stakeholders and the public to evaluate how the identified policies, strategies, and tools would enable each organization to promote affordable housing. This outreach should:

- include innovative approaches to reach the public in highly efficient ways,
- capture perspectives from a broad range of viewpoints, ensuring broad inclusion, particularly of hard-to-reach groups and housing insecure populations,
- include additional outreach to stakeholder groups and organizations,
- identify opportunities to coordinate and align efforts with stakeholder groups and organizations.

Deliverables to include:
- Outreach report,
- Updated stakeholder inventory.
Phase IV: Action Plan

This phase will build upon the results of previous phases to develop an action plan that describes the implementation strategy and resources for the previously identified priorities.

The action plan should:

- address the previously identified priorities, programs and/or policies,
- identify responsible agencies, implementation strategies and possible funding sources at the federal, state, regional, county or city level that could be leveraged for specific action items,
- address coordination with other planning processes currently underway, or under consideration, including zoning and land use, economic development, transportation, infrastructure, and other potential plans to align efforts,
- include performance metrics, such as Housing + Transportation affordability, to better measure the housing cost burden and performance-based planning strategies to better integrate impacts on housing affordability into local and regional decision-making, and
- identify key short-, mid- and long-term actions to implement the priority policies, strategies, and tools to achieve the vision and goals of the strategic plan.

This phase will also include the compilation of all previous work into a succinct and graphically compelling Regional Housing Coordination Plan that provides the Treasure Valley and its constituent housing organizations with goals, tools, strategies, and an action plan for increasing affordable housing.

Deliverables to include:

- Action plan,
- Performance metrics and performance-based planning strategies,
- Presentation to the COMPASS Regional Transportation Advisory Committee and the COMPASS Board of Directors, and
- Final Regional Housing Coordination Plan.