

Request for Proposals
2020 HOPWA Needs Assessment
Carolinas CARE Partnership

Charlotte – Gastonia MSA, North Carolina

Carolinas CARE Partnership seeks a contractor for a Housing Needs Assessment to be completed in 2020 for the Charlotte-Gastonia MSA.

Submission Deadline:

- Proposals should be received no later than February 28, 2020 at 5 pm EST.
- Submission should consist of :
 - 2 hard copies in a sealed envelope delivered to Shannon Farrar c/o Carolinas CARE Partnership 5855 Executive Center Drive Suite 101, Charlotte, NC 28212
 - And one electronic copy submitted to Shannonw@carolinascare.org.
- Any proposal received after that time shall not be considered, and shall be returned, unopened, to the proposer.
- Faxed submissions shall not be considered.
- Procedural and technical questions are to be submitted in writing to Shannon Farrar, Executive Director, by 5 pm January 31, 2020 , at shannonw@carolinascare.org.
- It is anticipated that all responders will be notified by January 6, 2020.

Submit proposals to:

Shannon Farrar, Executive Director
Carolinas CARE Partnership
5855 Executive Center Drive Suite 101
Charlotte, NC 28212

shannonw@carolinascare.org

Introduction/Background

Agency Description:

Carolinas CARE Partnership is a 501 (c) 3 non profit organization covering Cabarrus, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, and Union counties in NC and Chester, York, and Lancaster counties in SC. CCP was founded in 1990 to provide services, and funding to other organization to provide services, to prevent the spread of HIV and meet the needs of those impacted. CCP provides a broad range of services including HIV/STI education, testing, and linkage to care; medical case management; mental health; housing information services; housing subsidies and supportive services; Short-Term Rent, Mortgage, and Utility (STRMU) assistance and Permanent Housing Placement (PHP) or rental deposits; and owning and managing 21 units of housing. In addition, we fund partner agencies across the region to provide Housing Information Services; Operational Expenses for Residential Substance Abuse treatment and after-care, end-of-life care, and emergency shelters; supportive services to attach to rental subsidies; STRMU and PHP; and Housing Case Management. CCP is the HOPWA Project Sponsor for the Charlotte-Gastonia MSA.

Background:

CCP is soliciting a qualified consulting firm or individual to submit a full proposal for the preparation of a complete Housing Needs Assessment, including present and future affordable, accessible, market rate, micro-housing, rental, shared housing, agency-owned housing, ownership etc. in all aforementioned counties with attention made to urban, suburban, and rural areas alike.

CCP has not conducted a HOPWA needs assessment in a number of years. The most recent NA was completed in 2009. The NA process included analyzing data in our community specific to poverty, HIV-related housing needs, and its prevalence related to gender, age, race and ethnicity. CCP involved members of the low income community, community stakeholders and staff in order to identify unmet needs in our community. The result of the assessment identified housing needs in our community. This Request for Proposal is an opportunity for CCP to obtain specific data to guide both our housing development and advocacy strategy.

Purpose:

The 2020 Housing Needs Assessment should provide the following information and analysis of the community:

- To form a foundation of understanding, based on data sets, for strategic planning to address local housing needs for people living with HIV (PLWH), including the current inventory of rental units, rental subsidies and the needs of tenants by unit type, including accessible units for those with disabilities. The researcher should be able to present regional data.
- Provide an in-depth analysis of the current needs for affordable, and accessible housing, housing that accepts TBRA, as well as all types of future housing options. Current and future community households shall be reported incrementally in relation to the current and projected Area Median Incomes (AMI). There shall be low, median, and high projections of future AMIs.
- An analysis of the ability to support homeownership opportunities for different types of housing units including micro-housing and accessible units for those with disabilities.

- To develop a set of quantifiable and actionable recommendations to bridge those identified gaps.

Objectives:

- To identify current housing options and the number and types of future housing units needed by HIV+ households in the Charlotte-Gastonia MSA.
- Future analysis and recommendations to address the current trend of a widening gap between the necessary number of housing units to provide for the local HIV+ individuals and households below an income level to compete in the open market for housing, both rental and ownership opportunities. At a minimum, this shall establish income ranges for both affordable (low income) and accessible (teachers, fire, police, civil servants, etc.) housing. Future income ranges shall include low, median, and high projections.
- Identify recommended strategies to guide future decisions regarding removal of regulatory barriers, resource allocation and local policy and programmatic changes, implementation of which will result in bridging current and future housing gaps identified in the Needs Assessment.

The consultant will provide the data compiled in the Needs Assessment and work with Carolinas CARE Partnership to create a strategic plan to fill present, identified affordable & accessible housing gaps for PLWH. This analysis, in essence, will provide a rational basis for resource allocation deciding when, whether and why this community and other land or developing agencies should participate in creating, supporting and/or funding affordable and other housing developments, both present and future.

Study Area:

The primary study area encompasses the Charlotte-Gastonia MSA, including Cabarrus, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, and Union counties in NC and Chester, York, and Lancaster counties in SC, with data broken out by County.

CONSULTANTS ROLE AND SCOPE OF SERVICES

CCP desires the Consultant to develop a Housing Needs Assessment that includes an estimate of the existing need for housing and future need for housing. The goal is to identify specifically where and how the housing market is not meeting the current and future needs of HIV+ residents in terms of product, location and pricing. The future need for housing should include long term projections for the next 20 years in 5 year increments. The Needs Assessment should include a description of the methodology used and rationale behind all assumptions that are used. The Needs Assessment should also describe how the projections take into account the many variables that affect HIV+ low income housing demand, supply, and affordability, including but not limited to:

- Population and demographic trends
- Wages and household income
- Jobs and employment forecasts
- Lending practices and interest rates
- Seasonality of jobs

- Seasonality of tourists and retirees
- Local housing market trends
- Local housing stock (price, appreciation, affordability, age, condition)
- Impact of historic preservation requirements
- Availability of current affordable/section 8 housing
- Availability of accessible units
- Existing unit availability for size needed (specifically data around need for 1 bdrm apts)
- Distribution of jobs and housing throughout the counties and issues of fair share of housing (over-concentration of income levels, equitable mix, etc.)
- Commuting patterns, parking, and public transportation

In addition, CCP would like to understand the following:

- What state and local regulatory policies should the organization consider advocating adopting to require affordable & accessible units as part of a larger development?
- How Land Banks could be utilized and play a role in the future of development?
- What regulatory barriers might exist to decrease the viability of a strategic housing plan?

The Needs Assessment should be specific enough so it can be utilized to advocate for public policies and to also plan for and evaluate new housing projects. The Needs Assessment should provide an estimate of time frame and potential costs for keeping this assessment updated so it remains relevant over time. All assumptions, as well as the rationale for the consultant's methodology, must be fully explained within the Needs Assessment.

PRODUCTS AND DELIVERABLES:

Assuming that a direct survey(s) and interview(s) will be utilized for data gathering the following is expected to be produced by the consultant who is selected:

1. Process outline
2. Draft survey
3. Draft interview questions
4. Final survey
5. Draft report including trend analysis (electronic)
6. Final report including trend analysis (electronic)
7. Readable database in Excel format of data collected with ownership belonging to Carolinas CARE Partnership and the ability for CCP to modify and update in the future.

Generally, the 2020 Housing Needs Assessment should encompass the following scope of work:

• **Housing issues**

- o An estimate of the number of HIV+ households burdened by high housing costs, including those who are burdened and earn very low, low, moderate and middle incomes
- o An estimate of overcrowded housing units
- o An estimate of sub-standard dwelling units in need of rehabilitation/replacement
- o Estimated impact continued demolition in Jackson on housing stock/availability
- o Needs for HIV+:
 - TBRA properties not currently being supplied by market
 - Very low income/special populations (e.g. persons with fixed incomes)

- Senior population, including assisted living, life-care, retirees, etc.
 - Persons with disabilities
 - Veterans (not served by VA)
- Population Demographics
 - Includes breakdown of renters and owners earning <50% of the AMI (low income), 50% to 80% of the AMI (moderate income), 81% to 120% of AMI (middle income) and 120% - 200% of AMI.
 - Age vs income
 - Education vs income
 - Health/disability vs income
- Solutions & Recommendations
 - Quantifiable number of units needed of both rental and ownership housing stock to fill unmet needs, by bedroom size and price point
 - What options are available to address the housing needs in the study area
 - Identify regulatory barriers to production of affordable housing opportunities
 - Policy recommendations
 - Identification of potential solutions for policy makers, non-profit organizations and the private sector (including residents, potential residents and developers) to consider to address identified housing needs and problems
- Implementation Strategies
 - Suggest strategies for the creation and implementation of housing programs and development of properties to meet the gaps identified in the study.
 - Identify potential revenue funding sources for operational subsidies for housing programs and revenue stream for the production of units to meet area's unmet housing needs. This does not include modelling or strategic evaluation of these potential sources.

The consultant will present a draft of the Needs Assessment at public meetings (of CCP's choice). Based upon feedback and direction from CCP representatives, the consultant will modify the draft and complete the final Housing Needs Assessment.

The final product will be an electronic product in a searchable pdf and a word format and provided to the specified contact of CCP. The Housing Needs Assessment should be suitable for distribution among the citizens and business community. The consultant will present the final Housing Needs Assessment at a public meeting.

TIMELINE:

January 16, 2020 RFP v 2 Release

February 28, 2020: 5pm EST deadline for proposal in sealed envelope and electronically

March 15, 2020 : Notification to all bidders of bid amounts

April 1, 2020: Contract start day

Anticipated Completion Date: 4-6 months from date contract is executed; open to negotiation

PROPOSALS:

The following information should be included in the proposal for the Charlotte-Gastonia MSA HOPWA Housing Needs Assessment:

- A Cover Letter with the following information:
 - o Name and address of firm(s) and identification of the project leader/manager and all team member(s) responsible for completing tasks, including any subcontractors to this project.
 - o Statement of qualifications: Should include a resume, examples of prior experience in Housing Needs Assessments and the results of recommendations made. Names and telephone numbers of at least three (3) client references to whom the applicant has provided services similar to the project described in this RFP.
 - o Please include any other projects that the team is working on.
- PROJECT BUDGET AND SCOPE OF WORK:
 - o Total project costs should include travel, graphic design, and all other expenses
 - o A proposed Scope of Work and Itemized Budget:
 - 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. A reasonable attempt should be made to incorporate the “Timeline” as depicted above.
 - A clear description of how your firm would complete this project, including scope and methodology. Also, outline, in sufficient detail, the methods used for identifying the housing needs and a proposed outline of the contents of the Housing Needs Assessment.
 - Identify any tasks for which the staff at CCP will be responsible.
 - Specify the time, resources and costs required to complete the Housing Needs Assessment, including a total timeline and total cost for the entire project with each task clearly identified in the timeline.
 - A detailed work plan schedule, including completion times for each step and an overall timeframe for completion of project. Describe quality control procedures and cost control methods to be utilized to ensure delivery of contracted services.
- **All prices quoted must be firm for a period of 45 days after the proposal due date.**
- **A statement identifying any actual or potential conflicts of interest of any consultant, team member or subcontractor should be included as an addendum to our bid documents.**

The consultant should be aware of the potential for new tasks to be added to the scope of services both before and after the process gets underway. Any tasks added by CCP will be negotiated with the consultant.

CCP reserves the right to reject any and all proposals at its sole discretion. CCP will not pay costs incurred by the applicants associated with responding to this RFP. CCP reserves the right to cancel this RFP process at its discretion. All proposals submitted in response to this RFP shall be considered public information.

EVALUATION CRITERIA AND SELECTION PROCESS:

- Proposals will be evaluated using the following criteria (all criteria are weighed equally in the review of proposals). CCP, at its discretion, may consider other criteria brought to light during the review and interview process.
- Understanding the project and any previous work or familiarity within Charlotte – Gastonia MSA communities and HOPWA funding
- Approach and technical content of the proposal related to the scope of work

- Background and qualifications of the consultant and team
- Experience of the consultant in conducting similar projects and satisfactory recommendations of past clients
- Experience of the consultant in working with comparable jurisdictions with similar issues
- Cost and schedule of proposal

*Any suggestions regarding alternatives or additions to this scope of services are welcome.