
REQUEST FOR QUALIFICATIONS

*Creating a Comprehensive Housing Strategy for the Town of Mooresville,
North Carolina*

Requesting Party: Centralina Council of Governments (CCOG)

Submittal Address:

Centralina Council of Governments (CCOG)

Attn: Emily Parker

525 North Tryon Street, 12th Floor

Charlotte, North Carolina 28202

RFQ Submittal Deadline:

12:00 pm EST on Monday, July 27, 2015

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I. PURPOSE

The Centralina Council of Governments (CCOG) is soliciting “Consultant Qualification Statements” from interested parties to provide necessary professional services to assist in creating a Comprehensive Housing Strategy for the Town of Mooresville (TOWN), North Carolina. Qualification Statement packages must satisfy the minimum criteria outlined in this RFQ. Qualification package submittals shall be received by the CCOG by **noon EST on Monday, July 27, 2015**. The selected consultant or team will be required to complete the work outlined in the scope of services.

II. BACKGROUND

The Town of Mooresville (Iredell County) is a rapidly growing community of approximately 35,000 population located in the greater Charlotte region.

The Town of Mooresville has contracted with CCOG to engage public, private, and non-profit partners and include extensive public engagement to build a community-based housing strategy designed to identify practical strategies directed at assuring an adequate supply of housing to meet the needs of existing and future employees and residents of the community as it grows. The focus of this market analysis includes developing data to identify the quantity, price points, features, neighborhood and location amenities for owner-occupied and rental housing required to meet community needs.

This housing market data will be used by the community and its stakeholders to identify opportunities and barriers to achieving adequate housing to meet community needs and to provide relative timeframes under which market conditions could support the development of specific housing products.

III. SCOPE

The overarching goal of the Comprehensive Housing Strategy is to provide a community housing assessment and strategies that address current and future housing needs for all income levels and life stages within the Town of Mooresville’s jurisdiction. These strategies are intended to support job and economic growth as well as quality of life.

CCOG (the Client) intends to hire a qualified Consultant to provide housing market data to support development of a Comprehensive Housing Strategy for the Town of Mooresville and participate in the effort to incorporate the housing data provided into the Comprehensive Housing Strategies. The product of the work produced by the consultant selected through this request will be used to provide data that will inform the Comprehensive Housing Strategy. CCOG and the Town will develop a set of recommendations for public and private sector entities to better use existing and future infrastructure and resources to create more sustainable housing development at all income levels and life stages in the Town and its surrounding communities. These recommendations should help the public and private sector expand housing options that may not otherwise be available (due from barriers to providing different types of housing products because what is demanded may not be financially or economically feasible) that aligns housing choice with land use planning, transportation options, and employment centers for households at all income levels and life stages.

The consultant providing these services will be expected to gather data from existing sources but also to contact major employers in the greater Mooresville area to solicit information from them regarding projected expansions, types of jobs available, housing needs of employees, and other pertinent data in the development of the housing market analysis. The Town will coordinate

scheduling meetings with a minimum of six (6) and a maximum of twelve (12) employers to be interviewed by the selected consultant. The schedule will be established prior to contract execution. Centralina will make available the results of the initial community engagement event held on June 30, 2015. This information may be used to identify qualitative data for further research and analysis.

The results of the Mooresville Comprehensive Housing Strategy report will be required to be communicated in traditional market report format but also in formats suitable for a community engagement open house (see Appendix A) and summary report for communication to the general public and stakeholders. The community engagement component must include at least 12 but not more than 24 exhibits. The summary report will be limited to roughly 1,500 words (exclusive of exhibits).

Once the Comprehensive Housing Strategy is complete, community-based housing organizations, developers and builders should be able to use the analysis to complete their own, more detailed assessment based on specific development projects. It is intended that the Comprehensive Housing Strategy will be used as a tool for these organizations for financial institutions, for economic officials and as a marketing tool for major employers in the Town. It will be made available to these groups once finished.

The objectives of the Comprehensive Housing Strategy include, but are not limited to:

- Establishing current status of Mooresville housing stock within the price points affordable to the following incomes:
 - less than 30% AMI;
 - 30% to 50% AMI;
 - 50% to 80% AMI;
 - 80% to 120% AMI;
 - Over 120% AMI.
- Identification of those housing products that are or may become market or functionally obsolete (i.e., sub-standard and subject to removal) within the timeline of the study scope and a description of how rehabilitation, renovation or removal and new construction could assist in revitalization of existing housing stock within each of the price points described above.
- Identifying “niche” housing choices for a full variety of different lifestyles and life-stages (e.g., senior, empty nesters, young professionals, families) at price points described above.
- Increasing infill revitalization development sites that minimize neighborhoods displacement of disadvantaged populations and maximize the use of existing community infrastructure.

The results of this work will be dedicated to creating a Comprehensive Housing Strategy as outlined in this section. For the purpose of responding to this solicitation, the consultant’s experience and qualifications to supply the required services must be clearly demonstrated. A recommended scope of work must be provided as part of the response to this request. If selected, the Consultant will refine the scope of work that will be vetted through CCOG staff and the Mooresville Project Team.

The following items are envisioned as part of the general scope of services. The list is neither final nor complete, and is only intended to aid the Consultant in the preparation and assembly of a submittal. It is recommended that the proposal clearly establish phases and timelines to accomplish the work proposed.

The project scope should be designed to meet the following deliverables:

- Existing Housing Data, Reports. Review and analysis of existing housing data and reports, and creation of a digital library of existing data and reports.
- Quantify Housing Needs by housing type and price point in 5-year increments over 20 years (2020-2040). Assessment of gaps between current housing stock (to include housing stock and other properties suitable for housing re-development) and projected market demand, for each of four income levels (defined below) and anticipated life-stage/household compositions:
 - Income levels:
 - less than 30% AMI;
 - 30% to 50% AMI;
 - 50% to 80% AMI;
 - 80% to 120% AMI;
 - Over 120% AMI.
 - Projections based on:
 - extrapolation of current worker residence patterns
 - desired change in worker residence patterns
- Housing Locations. Locate Future Housing Types and Price Points in alignment with current and future employment centers, transportation, schools, key amenities, and with public engagement feedback; to include an analysis of commuting patterns based on where residents live and work to determine potential housing location preferences.
- Barriers to Meeting Housing Needs. To include:
 - Review of Town housing and land use plans and ordinances to identify barriers to meeting identified housing needs; and, review of other barriers identified by the Client, Town, and public engagement process.
 - Interviews with community developers about what obstacles exist to developing quality, affordable housing.
 - Analysis of the criteria used by all state and local funding sources (e.g., NCHFA and various Housing Trust Funds) to identify those criteria that may either hinder or facilitate the development of housing in the region for all income levels with suggestions on where changes in funding criteria could facilitate the development of more housing in the region for all income levels.
- Recommendations and options for addressing each of the above, with particular emphasis on:
 - The need to manage existing housing stock as well as plan for new housing stock;
 - The need for changes to housing and land use plans, including:
 - analysis and changes to zoning and planning ordinances;
 - analysis and changes to land use designations

- Creating collaborative public and private sector strategies to support development of quality that meets the needs of all segments of the community

IV. PROPOSAL STRUCTURE

The proposal must address all items set forth in the section below:

Statement of Qualifications

Qualifications should not exceed 20 pages (either 20 single-sided pages or 10 double-sided pages) in length. Please use 11 point font size. Any text beyond 20 pages will not be reviewed. Appendices are not allowed and will not be reviewed. Proposals should demonstrate that the consultant understands the intent of the project, the character of the deliverables, and the services required for their delivery. In addition, the qualifications to supply the required services must be clearly demonstrated. In order to assist in the evaluation process, please include the following requirements in the Statement of Qualifications:

- **Cover Letter**
- **Project Approach & Proposed Scope of Work**

This section should include a detailed description of the consultant's understanding of the intent of the project and its objectives, the character of the deliverables and a general approach to the project.
- **A schedule (in Gantt chart form) showing all milestones, products and critical meetings.**
- **Introduction to the Consultant Consultant(s)**

Consultants shall provide the following information. (The same information must be provided for each sub-consultant or each member of a joint venture):

 1. Consultant name and business address, including telephone number and email contact.
 2. Brief history of the consultant.
 3. Identify the state in which the consultant was organized or incorporated.
 - a. Type of ownership, and name and location of parent company and subsidiaries, if any.
 - b. Number of full-time employees. Part-time employees or consultants routinely engaged by the Consultant may be included, if clearly identified as such.
- **Qualifications and Experience of the Consultant Consultant(s)**

Please describe recent experience relevant to this project. Include past project budgets and whether or not the consultant was able to stay within the estimated budget. Particular emphasis should be placed on projects managed by the key personnel to be assigned to this project. Please submit names, addresses, and phone numbers of at least three references familiar with the Consultant's ability, experience, and reliability in the performance and management of projects of a similar nature. If the respondent anticipates the use of sub-consultants, the respondent shall identify:

 - a. The role and extent to which these parties will participate in the project;
 - b. The means by which the Consultant will oversee the work of these parties; and
 - c. The experience and credentials of these parties relevant to this project.
 - d. References: Please submit names, addresses, and phone numbers of at least two references familiar with the sub-consultant's ability, experience, and reliability in the performance and management of projects of a similar nature.

- **Qualifications and Experience of Key Staff**

Identify key individuals to be assigned to this project and include the function and/or responsibility of each of the identified individuals. The project manager shall be a Consultant. Experience summaries of these key individuals shall be provided, with emphasis on previous experience on similar projects in similar roles. Resumes of these key individuals may also be included.

If any of the above requirements are not met, the Statement of Qualifications may not be considered.

Project Cost Estimate

The budget allotted for this work is approximately \$15,000.00. However, notwithstanding this budget allocation the Client requests an approximate cost estimate for the work to be completed based on the information provided. This estimate is **non-binding and for information only, and is not part of the selection criteria**. Budget and scope of work may be modified. Final financial details will be arrived at through contract negotiations.

Submittal Instructions

Submit **eight (8) hard copies** of the consultant’s qualifications and a **digital copy** that matches the hard copy exactly. The digital copy should be saved as an Adobe PDF file (reduced size) and submitted to eparker@centralina.org by the proposal deadline. Number all pages consecutively. Clearly indicate the following on the outside of each submittal:

- Project name (Creating a Comprehensive Housing Strategy for the Town of Mooresville, North Carolina);
- Name, address, email address, and phone number of the primary consultant

Submissions must be received by **noon EST on Monday, July 27, 2015** at:

Centralina Council of Governments (CCOG)
 Attn: Emily Parker
 525 North Tryon Street, 12th Floor
 Charlotte, North Carolina 28202

V. PROJECT SCHEDULE

A copy of the Client’s current draft schedule (subject to change) is included below. This estimate is based on similar processes with a similar approval stream.

<u>Task</u>	<u>Timeline/Deadline</u>
Request for Qualifications Advertised	Friday, July 10, 2015
RFQ Questions Accepted Until	Friday, July 17 at 12:00 pm EST
RFQ Answers Posted to Town Website	Wednesday, July 22 by 4:30 pm EST
Optional Teleconference for Applicants	Monday, July 20 from 2:00 pm – 3:00 pm

Submittal of Qualifications Statement	Monday, July 27 by 12:00 pm EST
Review Team Evaluation	Week of July 27
Consultant Interviews, if needed <i>(In-person, conference call, Skype or equivalent are allowed)</i>	Week of August 3
Consultant Selection and Notification	Week of August 10
Post Selection Meeting with Consultant and Client-Consultant Contract Negotiations	Week of August 10
Award of Contract	By Friday, August 28
Anticipated Services Begin	Monday, August 31

Post Selection Meeting

It is anticipated that the submitted qualifications will not clearly establish all related tasks and respective responsible parties. Therefore, closely following Consultant selection, Client will meet with the selected Consultant to:

- Revise, as needed, the final scope of work,
- More precisely define work tasks, party responsibilities, project schedule, and project cost.

VI. CONSULTANT SELECTION PROCESS

The Client evaluation process will involve review of the Qualifications by a subset of the project Steering Committee, Project Team and CCOG staff based on the criteria outlined below. A list of consultants/teams will be developed in order of preference of the consultants/teams considered most highly qualified to perform the services. The evaluation criteria, with corresponding weight factors, consist of the following:

- Demonstration of overall project understanding and clarity of the proposal and creativity/thoroughness in addressing the project objectives and deliverables outlined in the RFQ (50%)
- Demonstrated experience in preparing market studies to support comprehensive housing strategies, providing recommendations based on strategies and successfully working with a diverse groups of stakeholders (25%)
- Qualifications of the consultant and personnel (including any subcontractors) to be assigned to this project demonstrating the Consultant's capacity to complete requested services, their experience completing similar projects, including experience with data collection and analysis on housing issues (25%)

The Client 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 in part or in its entirety this RFQ if it is in the best interests of the Client. This solicitation of qualifications in no way obligates the Client to award a contract. A short list of qualified consultants

will be selected from those who submitted qualifications for follow-up interviews. Interviews will be conducted by the of the Mooresville Project Team and CCOG staff. The interview format will include an oral presentation from the Consultant, to be followed by a question and answer period. Interviews will take place at the Mooresville Town offices during the week of August 3. Skype or an equivalent platform is also allowed if the Consultant is unable to attend in person.

VII. ADDITIONAL INFORMATION

The Client reserves the right to award the contract to any qualified bidder. This solicitation in no way obligates the Client to award a contract. Ten percent (10%) of total contract cost will be withheld as retainage pending project completion. All submittals become the property of the Client upon submission. The cost of preparing, submitting, and presenting qualifications lies solely with the proposer.

All data, databases, reports, designs and materials, in digital and hard copy format created under this project shall be transferred to the Client upon completion of the project and become the property of the Client.

Questions regarding this RFQ should be directed to Emily Parker at eparker@centralina.org. Questions will be accepted until Friday, July 17 at 12:00 pm EST and answers will be posted by Wednesday, July 22 by 4:30 pm EST. An optional teleconference will be held from 2:00 pm – 3:00 pm EST on Monday, July 20, 2015 for any applicant that would like clarification on any aspect of this RFQ. Please notify Emily Parker by close of business on Thursday, July 16 if you would like to participate in the teleconference.

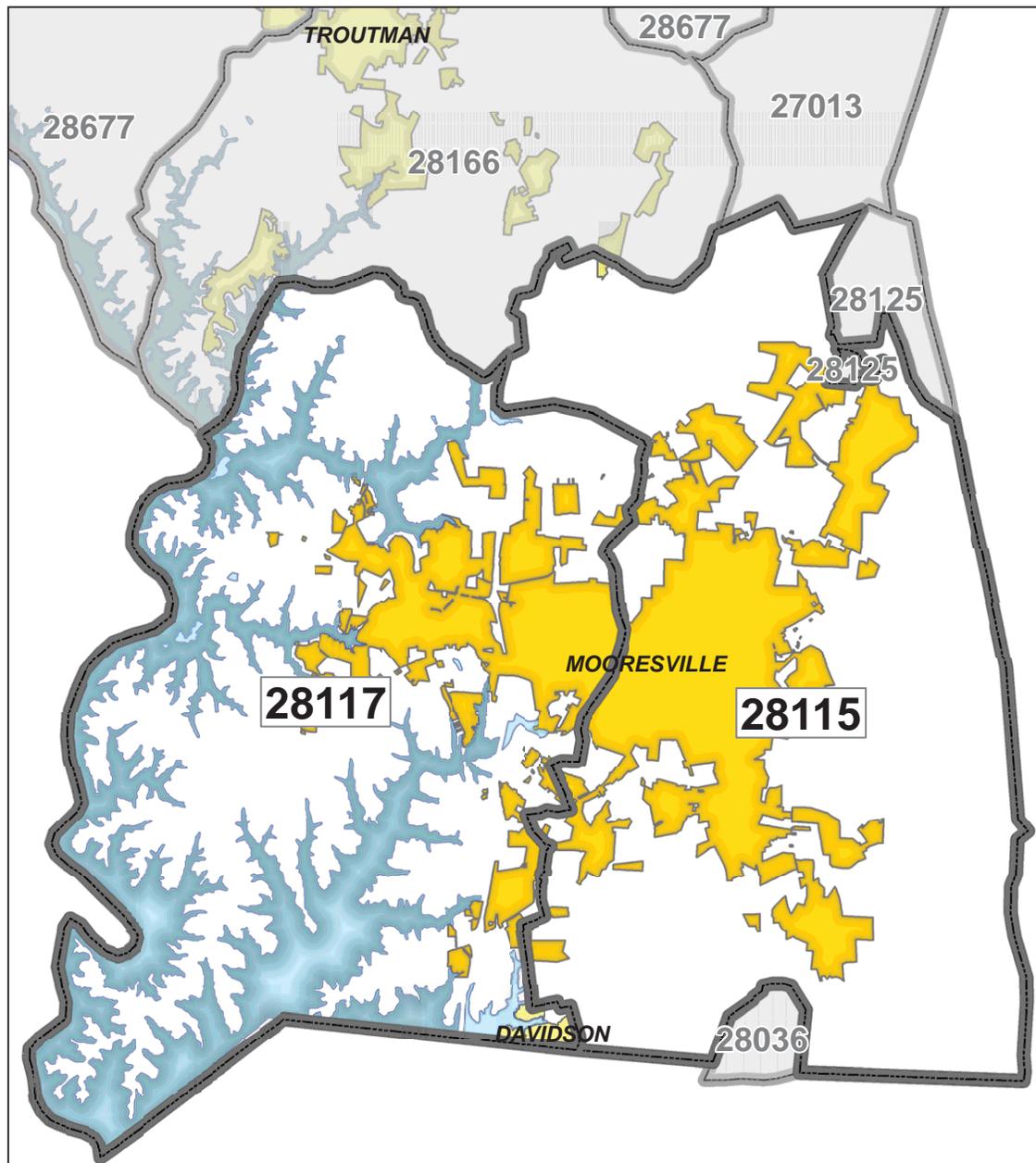
Appendix A



Local Housing Market Analysis



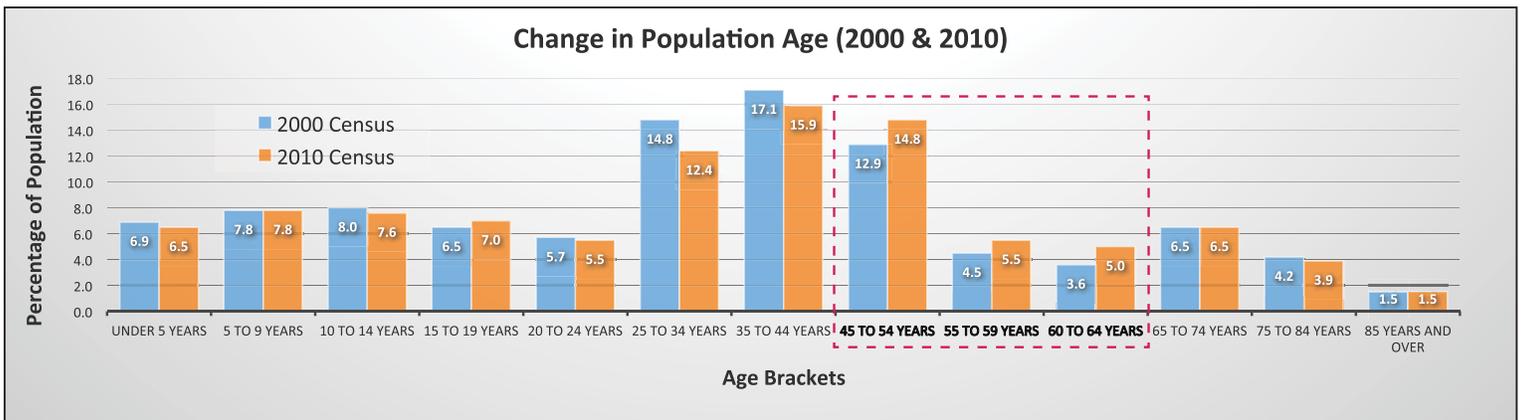
Mooresville Housing Data



For purposes of this Open House, the Mooresville charts that follow are based on U.S. Census data from zip codes **28117** and **28115**.



How has the age of our population changed?



Our population is aging.

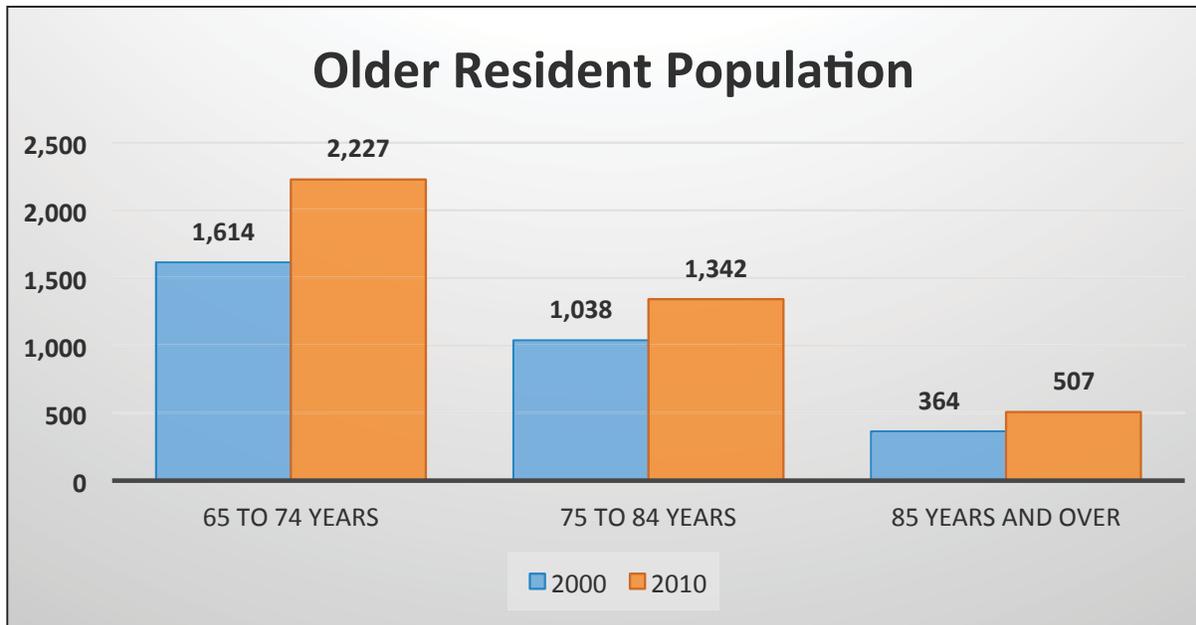
- The share of the population between 45 and 64 rose significantly from 2000 to 2010.
- The percentage of those aged 65 and older generally held steady.
- This increasing demand is beginning to impact the styles and types of housing demanded by aging residents.



Aging Population



How has the number of older residents changed?



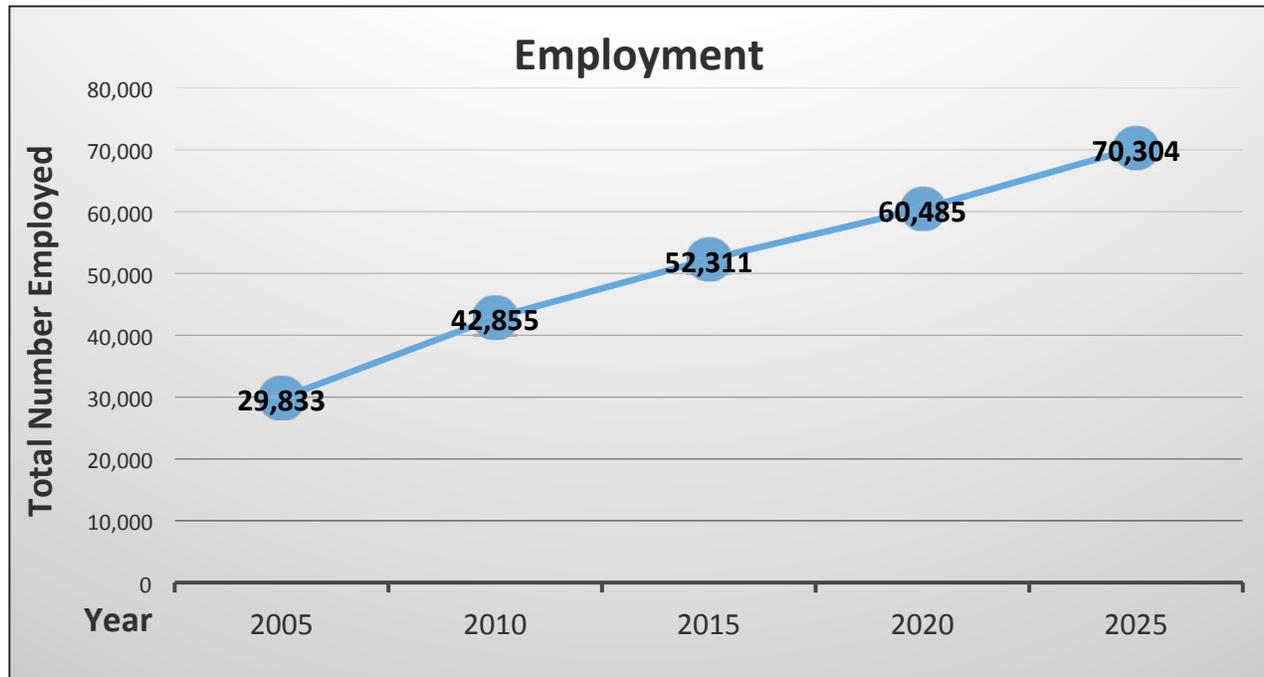
The number of residents ages 65 to 85 and over has increased.

- As a result, the demand will rise for housing that allows older residents to remain in the community and have a comfortable lower maintenance environment.





How is our employment forecast to change by 2025?



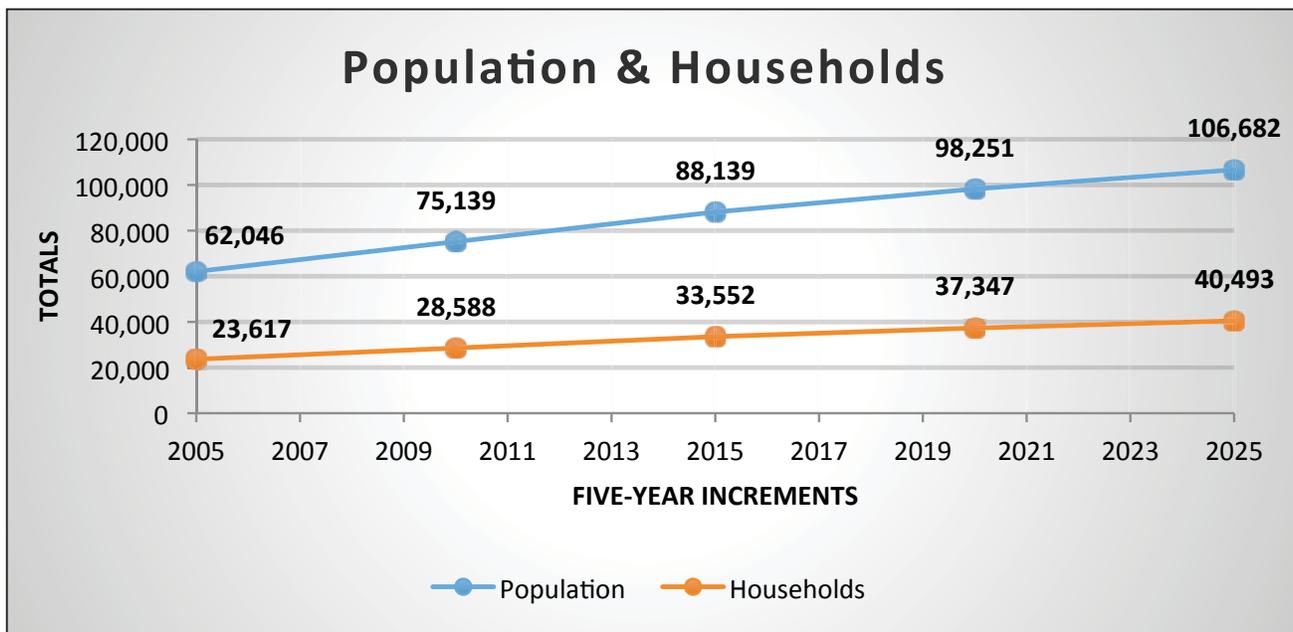
Our employment is growing.

- Our region's economy will continue to outperform national averages. Employment opportunities in Mooresville will continue to grow and attract people to our community.
- The growth in Mooresville's economy will bring a greater demand for more housing for workers.





How will our population and the number of households change by 2025?



Populations and the number of households will grow.

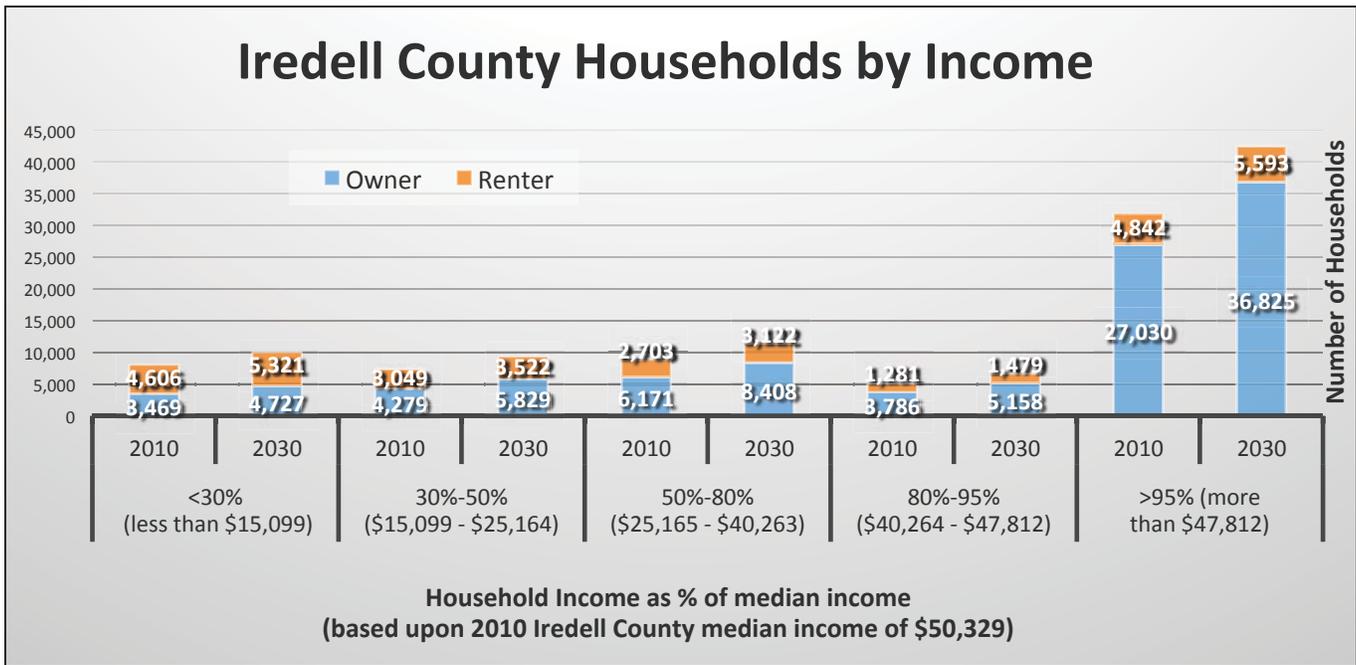
- The population is projected to exceed 100,000 by 2025.
- The total number of households will increase by 20.6% in the next 10 years.
- We will need more housing and a mix of housing types to meet the different needs of our growing population.



Households



How do the total number of households in Iredell County vary by income levels?



Iredell County households are and will continue to be spread across a wide range of income levels.

- Housing needs to be affordable at a wide range of incomes.
- At all income levels there is a demand for both rental and owner-occupied housing.



Aging Population



Households



Employment



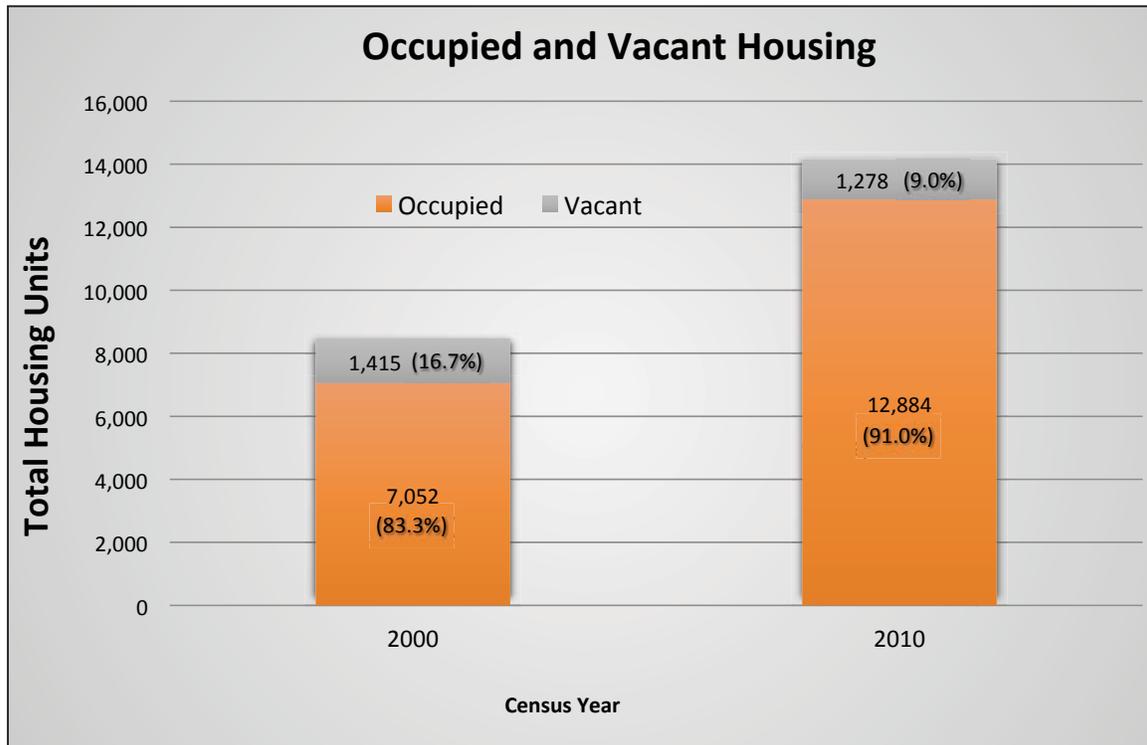
Population Growth



Occupied/Vacant Housing



How much of our housing is occupied?



We have more housing and more occupied housing.

- Housing demand is on the rise – there’s been a 40% increase in housing units and a decrease in vacant housing.
- Housing can be vacant for a number of reasons: there aren’t enough buyers or renters for that type of housing; the housing is unfit for occupancy; or, the unit is in transition.



Occupied/Vacant Housing



Preliminary Findings



Population Growth

Our population is growing rapidly. We will need to provide housing to meet that growth.



Aging Population

The growing number of older residents in our community impacts our current and future housing needs.



Households

Households come in different sizes and different levels of income, and that will impact future housing needs.



Employment

Increasing employment will result in a demand for housing near those jobs.



Occupied/Vacant Housing

Increased housing demand may provide opportunities to reduce the amount of vacant housing.