

Queen Anne's County, Maryland



Request for Proposals For Queen Anne's County Housing Study

Proposal Submission Deadline: March 10, 2020 at 10:00am

Mail or Hand Deliver Proposal to Primary Contact:

Michael Clark, Chief of Housing and Family Services

Division of Housing and Community Services

104 Powell Street, Centreville, Maryland 21617

410-758-3977

mclark@qac.org

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Advertisement

Queen Anne's County is soliciting proposals from qualified organization to assist the County with reviewing, amending, or replacing the County's current affordable housing programs. Organizations will assess the current and future economic climate to determine what demand exists for affordable rental units, affordable homeownership units, and at what prices and income levels are needed. Additionally, organizations will provide recommendations for effective strategies and policy changes that result in an effective affordable housing and the creation of workforce housing units in Queen Anne's County.

An electronic copy of the information package may be downloaded from emarylandmarketplace.com

Each proposal received in response to this RFP will be evaluated on the approach to analysis, methodology, capacity, experience and cost outlined in the RFP.

All proposals must be sealed, clearly marked "Queen Anne's County Housing Study" and must include all elements described in the information package.

One original, two hard copies and one electronic copy of the proposal, must be delivered in a sealed envelope to Queen Anne's County Division of Housing and Community Services, Attn: Michael Clark, 104 Powell Street, Centreville, Maryland 21617 before March 10, 2020, 10:00am. Information and questions can be addressed by Anne Van Benschoten at avanbenschoten@qac.org.

I. Project Overview

A. Introduction

The Queen Anne's County Division of Housing and Community Services, a division of the Department of Community Services, is soliciting proposals from qualified organizations to assist the County with reviewing, amending, or replacing the County's current affordable housing programs. Organizations will assess the current and future economic climate (10-15 years) to determine what demand exists for affordable rental units, affordable homeownership units, and at what prices and income levels are needed. It will examine the needs of the overall County and by geographic areas. Organizations will create an inventory of dwelling types in the County, such as: apartments, townhomes, single family homes, large family homes, elderly housing, studios, duplexes, condominiums and housing for special needs populations.

The organizations will assess recent trends, existing conditions, evaluate current policies, conduct community focus groups and provide surveys to identify gaps in the affordable housing market. Additionally, organizations will provide potential strategies, recommendations for policy changes, and innovative housing options that will result in affordable housing solutions for the residents in Queen Anne's County.

B. Division of Housing and Community Services Overview

The mission of the QACDHCS is to provide a broad range of housing related services to assist residents of Queen Anne's County acquire and maintain decent, safe and affordable housing. Ultimately, we want to help all County citizens become more self-sustainable by providing "a hand up and not a hand out." The division assists Queen Anne's County residents with a broad spectrum of services related to housing, from homelessness to first-time homeowners. The division encompasses three units that include: Homeless Assistance and Prevention; Housing Livability and Rehabilitation and Rental Code Enforcement; and Affordable Housing and Workforce Home Loans. More information regarding the units is at:

<https://md-queenannescounty2.civicplus.com/154/Housing>.

C. Background

Queen Anne's County is mostly a rural community, 372 square miles, with limited access to affordable housing. According to American Community Survey (ACS) Estimates (2017) there are 17,995 occupied housing units, with 81% homeowners and 19% renters. This is vastly different from Maryland state averages of 67% homeowners and 33% renters. This imbalance makes it difficult for low to moderate income families, who cannot afford homeownership, as the availability of rental units is considerably low. It also hurts the chance that new businesses will settle within the County, because their workforce will not be able to live near the business. Rental and housing needs

continues to be a rising concern, from 2010 to 2018 there was a 5.2% increase in population, compared to Maryland of only 4.7%.¹

Rental units in Queen Anne's County are not affordable. The median earnings for workers are \$41,583 with the median household income being \$89,241. Of the households who rent, 42% of them are using 35% or more of their household income, thus making it extremely difficult to make ends meet. There is also a growing population of seniors in Queen Anne's County, 18.8% of the population is 65 and over, compared to Maryland of 15.4%. While there is senior housing available, it is not nearly enough for the lower income seniors, there are 6.6% of seniors 65 and over living in poverty in Queen Anne's County.²

The Kent Island region is expanding with senior housing communities and new apartments. The largest senior development community will have a total of over 1,000 homes; however, this will not accommodate low-income seniors. The purchase price of houses and condominiums start at over \$400,000. There are high Home Owner's Association fees and property taxes. Thus, making it more of a retirement community for seniors moving to Queen Anne's County. Another example of expensive new housing, built in 2014, is a 144-apartment community with costs starting at \$1,400 for a one-bedroom. The HUD fair market value for rent in Queen Anne's County for a one-bedroom unit in 2019 is at \$1,074.³ This difference, especially for individuals making a median income salary, makes it extremely difficult to live beyond paycheck to paycheck. There are some low-income apartments available in the county, but have long waitlists, often over two years long.

Homeownership in Queen Anne's County is difficult for first-time homebuyers, and with median earning workers. The average sales price for homes in Queen Anne's County in July 2019 was \$377,604, median sales price was \$347,500. For comparison of two surrounding counties, Queen Anne's County is considerably higher. In Caroline county the average sales price was \$231,886 and the median sales price was \$239,500. Kent County's average sales price was slightly higher at \$381,119; however, the median sales price was only \$265,000.⁴ In 2018 in Maryland the median sales price was \$293,930; compared to Queen Anne's County at \$333,504. The housing costs make it extremely difficult for Queen Anne's County residents to purchase their first home, and to have our critical workforce stay in Queen Anne's County, there needs to be more affordable options or programs to assist the workforce and bring more critical workers to the County.

In response to the need for affordable and critical workforce housing, two loan programs were created, the Moderately Priced Dwelling Unit Loan Program; and the Critical Workforce Loan Program. The Moderately Priced Dwelling Unit (MPDU) was created in response to community

¹ US Census Bureau (2017). *Selected population estimates, Queen Anne's County, 2013-2017 American Community Survey 5- year estimates*. Retrieved from

https://factfinder.census.gov/faces/nav/jsf/pages/community_facts.xhtml?src=bkmk

² See note 1.

³ Rent Data (2019). *Maryland fair market rent for 2019*. Retrieved from

<https://www.rentdata.org/states/maryland/2019>

⁴ Maryland Realtors (2019). *July Data at a Glance*. Retrieved from

<http://www.mdrealtor.org/Publications/Publications/Monthly-Housing-Statistics>

needs for Queen Anne’s County citizens not in a critical workforce occupation. The MPDU Loan program was established with funds from developers who pay a fee-in-lieu of constructing at least 10% of their units as MPDU’s or donating property. Both of these programs provide a no-interest deferred mortgage for qualified buyers. Even with these programs, first-time homebuyers coupled with the high price of housing in Queen Anne’s County, it is difficult to purchase a home. The Moderately Priced Dwelling Unit Rental Program was created as an extension of the original MPDU program and it provides a reduced rent to a limited amount of qualified low to moderate income level residents. Even with these programs, there is still a shortage in affordable housing.

D. Request for Proposals

The contract will be awarded to the proposer that offers the most beneficial proposal encompassing all possible criteria established within this Request for Proposals, as well as cost for the proposed services and timeframe needed to complete the data collection and recommendation summary. Proposals will be reviewed privately and evaluated by a panel to make the final award decision.

II. Scope of Work and Deliverables

A. Project Details

Queen Anne’s County Housing Study is aimed to analyze solutions of the housing crisis in our rural and urban county. The housing study will incorporate a community housing needs assessment to determine the community’s issues and needs. The study will examine geographical areas of opportunity, blighted areas for possible rehabilitation and rental units, housing for specific populations such as older adults, and any other project also considered to assist low- and moderate-income level households. The study will provide an evaluation of existing County and Municipal ordinances and Comprehensive Plans coupled with an analysis of the current real estate market and projection of the future economic climate in Queen Anne’s County to recommend possible new inclusionary zoning policies. It will also review promising and proven housing strategies and estimate their capacity to succeed in Queen Anne’s County. The unique aspects of the County will be considered in this analysis.

The Scope of the Work and Deliverables to be provided by the proposer shall include, but not be limited to, the following:

Examination of Data

1. Market Analysis

- a. Economic feasibility of inclusionary zoning
- b. Cost to produce affordable housing vs. market rate housing. Broken down by rental and homeownership.

- c. Existing market demand for affordable housing and market rate housing broken down by:
 - i. Rental vs. homeownership
 - ii. Housing type
 - iii. Household size
 - iv. Income limits (i.e. 50% AMI, 80% AMI, 120% AMI)
 - d. Projected market demand for affordable housing and market rate housing broken down by:
 - i. Rental vs. homeownership
 - ii. Housing type
 - iii. Household size
 - iv. Income limits (i.e. 50% AMI, 80% AMI, 120% AMI)
 - e. Existing market supply for affordable housing broken down by:
 - i. Rental vs. homeownership
 - ii. Housing type
 - iii. Household size
 - iv. Income limits (i.e. 50% AMI, 80% AMI, 120% AMI)
 - f. Projected market supply for affordable housing broken down by:
 - i. Rental vs. homeownership
 - ii. Housing type
 - iii. Household size
 - iv. Income limits (i.e. 50% AMI, 80% AMI, 120% AMI)
 - g. Analysis of demographic, socio-economic and geographical data.
- 2. Affordable Housing and Zoning Analysis.
 - a. Review and evaluate current affordable housing policies of the County.
 - b. Identify existing barriers that impede the development of affordable housing.
 - i. Include a review of the County's and Towns' zoning codes and future land use maps and opportunity zones.
 - ii. Recommendations to address barriers.
 - c. Identify options for affordable housing construction or programs.
- 3. Community Housing Needs Assessment

The involvement of community members, residents, for-profit and non-profit housing developers, and elected officials is essential in developing a successful inclusionary zoning ordinance and policy. The Division expects that the contracted organization will host multiple public focus groups throughout different parts of the County to educate stakeholders on inclusionary zoning and affordable housing best practices, the affordable housing demand in Queen Anne's County, as well as to encourage stakeholder recommendations and input. If necessary, proposers may be required to provide interpretations to non-English speaking residents.

 - a. Host meetings with stakeholders.

Including, but not limited to:

- i. Community members and leaders;
- ii. Private, for profit housing developers;
- iii. Affordable housing advocates;
- iv. Queen Anne’s County elected officials and commissioners; and
- v. Representatives of and organizations serving protected classes.

Topics to include, at a minimum:

- vi. Defining and explaining current zoning regulations and other land use policy documents.
- vii. Defining and explaining workforce and affordable housing.
- viii. The affordable housing demand in Queen Anne’s County.
- ix. Case examples of national best practices for housing programs, housing trust funds, opportunity zones, and others.
- x. Solicitation of public recommendations and input.
- xi. Creating community support with affordable/workforce housing.

b. Generation of an online survey and comment submission portal.

4. Create an easily-readable fact sheet of data on affordable housing in Queen Anne’s County that can be distributed to stakeholders.

Conclusions and Recommendations

- I. Identify incentives and alternatives to improve or expand affordable and workforce housing.
- II. Financial benefits, costs, political risks and impacts of incentives.
- III. Identify any additional resources, legal or otherwise, necessary to implement recommendations.
- IV. Predict future housing needs over the next 15-20 years.
- V. Create a plan including a timeline for implementation of suggested strategies.

III. Proposal Format, Content, and Submission Requirements

A. Submission of Proposals and Deadline

Provide one electronic copy, one original and two hard copies in one sealed, company-marked envelop and clearly labeled “Queen Anne’s County Housing Study” to Queen Anne’s County Division of Housing and Community Services by 10:00am on March, 10, 2020. The Proposal should be addressed to:

Michael Clark
Chief of Housing and Family Services
Division of Housing and Community Services
104 Powell Street
Centreville, Maryland 21617

Proposals will not be accepted after 10:00am on March 10, 2020.

There is no expressed or implied obligation for Queen Anne's County to reimburse organizations for any expenses incurred in preparing proposals in response to this request. Queen Anne's County reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected.

Submission of a proposal indicates acceptance by the organization of the conditions contained in this Request for Proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract.

B. Equal Opportunity

All qualified persons, firms and proposers will receive consideration without regard to age, color, disability, gender, national origin, race, religion or sexual orientation. Minority Business Enterprises (MBE), Women-Owned Enterprises (WBE), and Veteran-Owned Enterprises are encouraged to apply.

C. Queen Anne's County Standard Operating Policies: Procurement Policy #400-010

It is the responsibility of the proposer to review and adhere to all of Queen Anne's County Procurement Policies, #400-010. The policies can be located at <https://www.qac.org/593/Procurement>.

D. Questions about the Request for Proposals

Questions related to the scope of work, requests for additional information, and/or concerns about the submission of the proposal, may be directed to Anne Van Benschoten at avanbenschoten@qac.org by February 26, 2020, 4:30pm. No questions will be responded to via telephone or other methods. Questions and Answers will be posted in the form of an Addendum to the original post on emarylandmarketplace.com on February 28, 2020.

E. Minimum Proposal Requirements

1. Contents

- a. An executive summary of not more than one page.
- b. Description of approach/methodology to the scope of services.
- c. Description of deliverable products.

- d. Implementation schedule of how the study would progress, and at what points various tasks will be completed, including 25%, 50%, 75% and 100% of completion.
- e. A general background of your organization including:
 - i. Description of similar studies undertaken.
 - ii. Location of planning organization.
 - iii. Resumes of staff members to be assigned to this study.
 - iv. Samples of similar work completed in the last three years.
 - v. Names and contact information for three references familiar with similar work.
 - vi. Experience with inclusionary zoning programs, affordable housing and housing trust funds.
 - vii. Experience with market studies and data assessment interpretation.
 - viii. Familiar with Queen Anne's County.
- f. Plans for subcontracting.
- g. Costs by work product and total cost.
- h. Signed proposer warranty.

F. Debarred, Suspended and Ineligible Contractors

The consultant certifies by submission of a proposal that it is not a debarred, suspended or ineligible contractor by any Agency of Federal or State government, no proposal received from a debarred, suspended or ineligible contractor will qualify for an award.

G. Acceptance of Consultant Proposals

The Queen Anne's County Commissioners reserve the right to reject any or all proposals, to waive any nonmaterial irregularities in the proposal, to accept or reject any item or combination of items and accept any proposal which best benefits the people of Queen Anne's County. Queen Anne's County reserves the right to negotiate with any, none or all of the proposing vendors. Queen Anne's County is an Equal Opportunity Employer.

H. Scoring of Proposals

Each proposal will be rated and ranked in accordance with the following criteria:

1. Approach for conducting the analysis (15 points)
2. Specific methodologies for completing various aspects of the study (20 points)
3. Demonstrated ability and capacity (15 points)
4. Technical qualifications of individuals to be assigned to project (15 points)
5. Ability to meet proposed timeline (15 points)
6. Total price of study (20 points)

Queen Anne's County reserved the right to award a contract based solely on the proposals or to negotiate with one or more consultants. During the evaluation process Queen Anne's County may request additional information or clarification from applicants. The consultant selected will be

chosen on the basis it is the best fit for the County, and may not necessarily be based on the lowest price. The chosen consultant must agree to execute a contract within 30 days after the Notice of Award. No contract may be assigned, either in whole or in part, without the prior approval of Queen Anne's County.

I. Contract Price and Payment

The Proposal must state the total planned hours and hourly rate by staff classification of those anticipated to work on the project. An all-inclusive maximum fee for each work product, broken down by hourly rates must be provided, as well as an all-inclusive maximum fee for the entire study.

The price quoted in the proposal must be firm and not subject to change. The price shall represent the total cost to Queen Anne's County including direct, indirect and out-of-pocket expenses. Quoted costs should include, but not be limited to, meeting with County staff, stakeholder meetings, public hearings and presentation of final report.

Payment will be made upon approval of products at 25%, 50% and 75% completion. The final 25% will be paid upon completion and approval of all products.

IV. Timelines

A. RFP Timeline

February 19, 2020	Release of Request for Proposals
February 26, 2020, 4:30pm	Deadline to submit questions
February 28, 2020	Answers to questions will be posted.
March 10, 2020, 10:00am	RFP Responses due to Queen Anne's County, Bid Opening

B. Project Timeline

Interim due dates are estimated and will be confirmed upon execution of a contract. Proposers are required to develop a more comprehensive proposed timeline for completion of the project. All work products must be completed by July 31, 2020.

<u>March/April 2020</u>	Initial Meeting(s) with Queen Anne's County
<u>April 2020</u>	Market Study
<u>April-May 2020</u>	Stakeholder Meetings Analysis and evaluation
<u>May 2020</u>	Drafting of policy and ordinance recommendations

June/July 2020

Final deliverables

Presentation of report and analysis

Acknowledgement of RFP Terms and Conditions

Proposer, as part of its Response, must submit this document signed by a representative(s) authorized by the proposer to make representations for the proposer and to obligate the proposer to perform the commitments contained in its response.

Acknowledged and Agreed:

Signature

Printed Name

Title

Firm Name

City, State

Phone Number

Date

Signature

Printed Name

Title

Firm Name

City, State

Phone Number

Date

Signature

Printed Name

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