



Request for Proposal - Issued 7/15/19 Updated 8/1/19

**COMPREHENSIVE HOUSING MARKET STUDY AND NEEDS ANALYSIS**  
Village of Shorewood Community Development Authority

**Proposal Requested**

The Village of Shorewood Community Development Authority is soliciting proposals for a comprehensive Housing Market Study and Needs Analysis. The results of this Housing Study and Needs Analysis will help decision makers, stakeholders and community members develop a meaningful sense of the housing market as well as an understanding of key housing issues, including affordability. The study should provide a measured assessment of present and future unmet housing demand that focuses on creating a deeper understanding of short-to-mid-term housing demand (5-year, 10-year, 15-year.) The report is intended to offer a solid, data-driven basis for formulating community-specific housing priorities, policy alternatives and intervention strategies, including recommendations to restart a suspended loan program.

**Community Background**

The village of Shorewood, Wisconsin (population 13,315 – 1.2 sq. miles) is located within Milwaukee County’s North Shore communities. It is a completely built-out, first-ring, walkable urban suburb of the city of Milwaukee that is amongst the most densely developed municipalities in the state of Wisconsin. Shorewood is a well-educated community with excellent schools offering quality education. Of the population age 25 and older in Shorewood, 69% possess at least a bachelor’s degree and 35% possess a graduate or professional degree. The village is adjacent to the University of Wisconsin-Milwaukee, which also affects housing demands. Shorewood has a diversity of housing options. Of its approximately 6,453 housing units, 53.4% are renter occupied. The Village also maintains two commercial corridors (N. Oakland Ave. and E. Capitol Dr.) that have witnessed significant multi-story office, residential and mixed-use properties within the past decade.

**Estimated Timeline**

The CDA anticipates that this analysis can be undertaken in the fall of 2019. Details of the RFP timeline are noted below.

Deadline for proposal questions and notice of interest	July 30, 2019
Proposal question responses emailed to consultants of interest	August 1, 2019
Proposals due	August 9, 2019
Firms notified of interview	August 16, 2019
Interviews	August 19-23, 2019
CDA consideration of selection	September 6, 2019

The above schedule for review by the CDA is subject to change. The CDA does anticipate the need to conduct interviews for this RFP process. The CDA will not be legally obligated to adhere to the dates for interviews, recommendations and award. Interviews will be with staff and representatives of the CDA as chosen by its Chair.

### **Project Scope**

The scope area of this study encompasses the village of Shorewood. However, consideration should be given to the housing demands and availability of the local market as well as the larger MSA.

#### *Task 1: Minimum Required Data Elements*

The selected consultant is free to develop specific data analysis methodology as they deem appropriate. However, the final document should, at a minimum, quantify the following data elements and use of as much available 2010 and newer census data as possible is required:

#### 1. Demographics – current and projected (5-yr, 10-yr, 15-yr)

- Population by age
- Households by income, age, size
- Number of renter households at both 50% and 80% of AMI
- Commuting patterns

#### 2. Existing Housing stock

- By tenure – rent, own
- By type – single, duplex, multi-family
  - Where do gaps exist, if any
- By value – property values, rents
  - Where do gaps exist, if any
- By age and condition
- Vacancy rates

#### 3. Other Housing Issues

- Affordable housing analysis – definitions of affordable housing based on statistics, local housing and transportation costs in relation to income, any existing areas of naturally occurring affordable housing, subsidized housing, tax credit developments, public housing
- Housing affordability compared to other surrounding markets, (e.g., Milwaukee, Whitefish Bay, Glendale and Wauwatosa.)
- Senior/Assisted living options
- Special Needs housing
- Housing market turnover/sales data
- Rental market analysis including information on existing rental properties that are two (duplex) and three (tri-plex) units related to rents, size, vacancies and amenities and resident profiles. Include information on rental housing needs.

- Rental market analysis including information on existing rental properties over 4 units related to rents, size, vacancies and amenities and resident profiles. Include information on rental housing needs.
- Senior and family market analysis including information on existing properties related to price, rents, size, vacancies, amenities and resident profiles. Include information on senior and family housing needs.

*Task 2: Community Questions*

Utilizing the obtained market and demographic data, the following questions, at a minimum, should be addressed within the study:

1. What are the current demographic and economic characteristics of households living in Shorewood?
2. What can Shorewood expect with respect to changing demographic and economic characteristics in the next 2-5 years? 10 years? 15 years?
3. What are the current housing characteristics in Shorewood, including owner-occupied vs. renter-occupied, age and condition, size, including number of bedrooms, and price range.
4. What is the nature and extent of housing demand in Shorewood, including residents currently living in Shorewood and nonresidents who may want to live in the community?
5. What aspects of housing demand does Shorewood's supply currently not meet, such as affordable, accessible, price, size, number of bedrooms, special/supportive needs.
6. How are the following groups impacted by current and future housing market demand: Seniors, Families, Persons with Special Needs, Students, and Young Professionals.
7. What impact, if any, has development within the past 10 years had on the housing market of the community?
8. What impact, if any, does short term rental (such as AirBnb) have on our housing market.
9. Are there barriers/opportunities or interest in Accessory Dwelling Units, Micro Apartments, Co-housing or Home-sharing?
10. What aspects of our supply or market demands might lead towards tear-downs?

*Subtask 2A:*

1. What is the meaning and state of housing affordability in Shorewood? (Please include information complete enough to comply with State of Wisconsin Act 243 Housing Report Requirements.)

*Task 3: Recommendations*

Based on analysis of the data collected, provide recommendations for:

1. What types of housing (i.e. owner occupied, rental (market rate or affordable), assisted, elderly, special needs, work-force, student, young professional, etc.) will not be met by supply in the short, medium, and long term.

2. What types of housing, if any, could be pursued and supported, and what barriers currently exist to their development.
3. What housing demands will likely not be met without intervention, subsidy, incentives, innovative programs, code revisions, etc.
4. What types of programs, established as well as new and innovative, could Shorewood seek/provide for the development and/or redevelopment of necessary housing, including examples from comparable communities.

#### *Public Participation*

At minimum, the successful consultant is responsible for undertaking the following public participation activities:

- Initially, the selected firm will meet with Village staff to better define the results being sought and the methodologies the firm will use. The consultant is expected to work closely with all identified stakeholders and meet with Village staff/departments on a regular basis;
- After data is collected, the selected firm will meet with the CDA to present the data findings prior to developing recommendations and a draft report.
- At least two public input sessions/workshops at 1 p.m. and 6 p.m. on the same day to help identify citizen needs and input to help determine what housing facilities/programs should be developed, if any; and,
- Attend at least one CDA meeting to present draft findings and recommendations, prior to preparation of final report.
- Attend and present final report to CDA at a minimum of one (1) meeting to obtain final plan approval

#### *Deliverables*

A draft plan submittal will be required for review and comment by the CDA prior to completing the final report and plan. The CDA shall receive an electronic copy of the draft plan, as well as ten (10) full-color (8-1/2 "x 11") copies no later than **three months from the start of the contract**. Report maps should be color 11" x 17" in size.

Once finalized, the CDA shall also receive all original documents electronically in Microsoft Word, Excel and PDF formats (including a printable PDF version of the entire plan for CDA's use). Maps and plans shall be delivered electronically and be compatible with the Village's GIS software.

#### *Reference Materials*

The consultant should reference the [Village of Shorewood Comprehensive Plan 2030](#) adopted in 2011, the [2010 Village of Shorewood Senior Housing Survey Report](#) and the 2006 [Housing Feasibility Study](#). Additionally, regional information should be referenced from the Southeastern Wisconsin Regional Planning Commission (SEWRPC) Regional Housing Plan: 2035 and the SEWRPC Regional Housing Plan Implementation Report: 2013 (<http://www.sewrpc.org/SEWRPC/Housing.htm>).

#### **Proposal Content**

The proposal should not exceed 10 single-sided pages and should address the following:

1. Transmittal Information.
  - a. Firm's name, address, telephone number and contact person.
  - b. Firm's confirmation of understanding of the project and commitment to provide the appropriate personnel, equipment and facilities to perform the scope of services as defined in this document.
  
2. Approach.
  - a. Provide a description of the anticipated analysis, planning and recommendation efforts.
  - b. Describe the methods to be used for communicating with the project team and public.
  - c. Describe the firm's approach and method for facilitation and coordination of public input for projects, including the use of citizen boards and committees.
  - d. Outline your proposed staffing levels and activities.
  - e. Detail your proposed project schedule.
  - f. Describe how the consultant will manage overall quality control of the project.
  - g. Provide estimated hours for all tasks.
  
3. Personnel Experience. For each project team member please submit a BRIEF description of the following:
  - a. Name
  - b. Proposed responsibilities
  - c. Professional registrations
  - d. Description of related past experience, particularly experience of a similar capacity on projects of comparable size and/or scope
  
4. Previous work samples and references.
  - a. Provide examples of previous, related work. Full documents may be attached as appendices, as necessary.
  - b. Provide a list of at least references of comparable clients.
  
5. Cost.
  - a. Provide a cost "not to exceed" per task and any sub-tasks along with an hourly rate for each project team member working on those tasks and a detailed analysis of the expected hours by task and position to satisfactorily perform the scope of services.
  - b. Please note there will be no reimbursement for travel time, meals, or mileage; these incidental costs should be included in the hourly rates.
  - c. Describe the circumstances under which you would propose to modify the fees, including the rate at which the Village would be charged for additional work, and how you would communicate such a potential modification to the Village of Shorewood.
  
6. Contract
  - a. Please attach a copy of your standard contract for these types of services in the email submitting the proposal.
  
7. Insurance
  - a. The proposal must include either a description of the firm's insurance or a certificate of insurance outlining the firm's insurance policies that evidences compliance with the requirements noted in the *Terms and Conditions* section of this RFP.

## **Terms and Conditions**

### *Payment Terms*

The CDA will enter into a contract for professional consulting services based on a fixed-price, not-to-exceed amount with the contractor for the specified scope of services. The exact payment schedule will be negotiated and determined as part of the contract and shall be based on the budget provided with the proposal.

### *Insurance*

The successful firm shall agree that it will, at all times during the term of the agreement, keep in force and effect insurance policies required by the contract, issued by a company or companies authorized to do business in the State of Wisconsin and satisfactory to the Village. Such insurance shall be primary. Prior to execution of the written contract, the successful firm shall furnish the Village with a Certificate of Insurance listing the Village as an additional insured and upon request, certified copies of the required insurance policies. The Certificate shall reference the contract and provide for thirty (30) days advance notice of cancellation or nonrenewal during the term of the agreement. Failure to submit an insurance certificate, as required, can make the contract voidable at the Village's discretion. Additionally, the Firm shall not allow any subcontractor to commence work until the aforementioned documents, where applicable, have been obtained from the subcontractor and approved by Village of Shorewood.

### *Nondiscrimination*

In connection with the performance of work under this agreement, the Firm agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, marital status, sexual orientation, sex, disability, national origin or ancestry. This provision must be included in all subcontracts.

### *Assignment or Subcontract*

The contract may not be assigned or subcontracted by the firm without the written consent of the Village. If all or a portion on the contract work is proposed to assigned or subcontracted, the name of the individual(s) to complete the work, address and firm proposed shall be submitted within the scope of the proposal.

### *Independent Contractor Status*

The firm agrees that it is an independent Contractor with respect to the services provided pursuant to this agreement. Nothing in this agreement shall be considered to create the relationship of employer and employee between the parties.

### *Amendments to Contract*

This contract may be modified only by written amendment to the contract, signed by both parties.

### *Waiver*

One or more waivers by any party of any term of the contract will not be construed as a waiver of a subsequent breach of the same or any other term. The consent or approval given by any party with respect to any act by the other party requiring such consent or approval shall not be deemed to waive the need for further consent or approval of any subsequent similar act by such party.

### *Indemnification and Defense of Suits*

The firm agrees to indemnify, hold harmless, and defend the Village, its officers, agents and employees from any and all liability including claims, demands, damages, actions or causes of action, together with any and all losses, costs, or expense, including attorney fees, where such liability is founded upon or grows out of the acts, errors, or omissions of the firm, its employees, agents or subcontractors.

### *Contract Period*

The anticipated project duration is approximately four (4) months after the CDA directs the Consultant(s) to begin the project. The term of this contract will be as specified in the contract document.

### *Termination of Contract*

To be defined in the contract document.

### *Professional Services Contract*

If your proposal is accepted and a contract is issued, then this Request for Proposal and all documents attached hereto including any amendments, the firm's technical and price proposals, and any other written offers/clarifications made by the firm and accepted by the Village, will be incorporated into a contract between the Village and the firm, it shall contain all the terms and conditions agreed on by the parties hereto, and no other agreement regarding the subject matter of this proposal shall be determined to exist or bind any of the parties hereto.

The submission of a proposal shall be considered as a representation that the firm has carefully investigated all conditions, has full knowledge of the scope, nature and quality of work required, and is familiar with all applicable State, Federal and Local regulations that affect, or may at some future date affect the performance of this contract.

Acceptance of this proposal will take place only upon award by the Village Board, execution of the contract by the proper Village officials, and delivery of the fully executed contract to the firm. Acceptance may be revoked at any time prior to delivery of the fully executed contract to the successful firm. The contract may be amended only by written agreement between the firm and the Village of Shorewood.

### *Public Information*

Information supplied by any proposer and the chosen consultant of this RFP is subject to the Wisconsin Public Records Law sec. 19.35 Wis. Stats. Such information shall become public unless it falls within one of the exceptions in the statute, such as security information, trade secret information, or labor relations information. If the Proposer believes any information which is not public will be supplied in response to this RFP, the vendor shall take reasonable steps to identify for the CDA which data, if any, it believes falls within the exceptions. If the proposal data is not marked in such a way as to identify non-public data, the CDA will treat the information as public and release it upon request. In addition, the CDA reserves the right to make the final determination of whether data identified by the proposer identified as not public falls within the exceptions within the statute. The same laws apply to the final plan documents and all information obtained to complete the final plan and the CDA retains ownership of all documents.

## **Selection Criteria**

The CDA and Village staff will consider the following in evaluation of the proposals:

1. The content, completeness, adherence to format and appropriateness of the proposal.
2. The reputation, experience, technical competence and diversity of the firm's chosen team.
3. Perceived creativity, innovation, quality control and commitment that the firm will bring to the project.
4. The experience and capabilities of the project manager and other staff who will be assigned to the project with projects of comparable nature.
5. Demonstrated familiarity with housing studies and needs analysis.
6. References that indicate successful projects and successful client/team/consultant relationships.
7. The effectiveness of the firm's oral, written and graphic presentation skills.
8. Suggested public involvement plan.
9. Ability to complete the project within the necessary timeframe.
10. Cost.

The CDA expects to select a short list of proposers to make an oral presentation. The presentation, limited to 30 minutes, shall serve to confirm proposal representations, answer CDA questions, provide supplemental information and provide the CDA the opportunity to meet and assess the project consultants.

The CDA reserves the right to accept or reject any or all proposals or portions thereof without stated cause. The CDA reserves the right to re-issue any Request for Proposals.

Upon selection of a finalist, the CDA by its proper officials shall attempt to negotiate and reach a final agreement with the finalist. If the CDA, for any reason, is unable to reach a final agreement with this finalist, the CDA then reserves the right to reject such finalist and negotiate a final agreement with another finalist who has the next most viable proposal or bid. The CDA may also elect to reject all proposals and re-issue a new RFP.

Clarification of proposals: The CDA reserves the right to obtain clarification of any point in a Proposer's proposal or obtain additional information.

The CDA is not bound to accept the proposal with the lowest cost, but may accept the proposal that demonstrates the best ability to meet the needs of the CDA.

The CDA reserves the right to waive any formalities, defects, or irregularities, in any proposal, response, and/or submittal where the acceptance, rejection, or waiving of such is in the best interests of the CDA.

The CDA reserves the right to disqualify any proposal, before or after opening, upon evidence of collusion, intent to defraud, or any other illegal practice on the part of the Proposer.

## **Instructions to Firms**

### *Submittal Instructions*

1. Please provide (1) digital copy of the proposal via email only to:  
Bart Griepentrog, AICP  
Planning & Development Director

bgriepentrog@villageofshorewood.org  
Identify proposal name into subject line of the email:  
Comprehensive Housing Market Study and Needs Assessment  
Deadline:  
4:30 pm CST- **August 9, 2019**

2. Proposals will be accepted on or before the deadline identified above. Proposals received after that date and time will be rejected. Proposals will not be opened publicly.
3. Questions regarding this RFP should only be directed to staff member identified above. Contact with elected officials, committee members and other staff members is grounds for disqualification.

This RFP does not commit the CDA to award a contract, to pay any costs incurred in the preparation of a response to this request or to procure or contract for services or supplies. The CDA reserves the right to accept or reject any or all proposals received as a result of this request, to waive minor irregularities in the procedure, to negotiate with any qualified source, or to cancel in part or in its entirety, this RFP, if it is in the best interest of the CDA of the Village of Shorewood to do so.

#### *Notification of Award*

The CDA plans to select a consultant by approximately September 6, 2019. Should either party fail to execute a contract within 60 days of notification of award, the CDA reserves the right to rescind the award and select services from another interested firm.

#### *Amendments*

Amendment of proposals may be done as follows:

By CDA: Proposals may be amended by the CDA in response to need for further clarification, specifications and/or requirements changes, new opening date, etc. Copies of the amendment will be mailed to prospective vendors.

By Firm: Proposals may only be amended after receipt by the CDA by submitting a later dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the opening date unless requested by the CDA.

Proposals may be withdrawn only in total, and only by a written request to the CDA prior to the time and date scheduled for opening of proposals.

#### *Contract Administration*

The staff member is the primary contact for contract administration of this proposal:

Bart Griepentrog, AICP  
Planning & Development Director  
[bgriepentrog@villageofshorewood.org](mailto:bgriepentrog@villageofshorewood.org)  
(414) 847-2647

In the absence of the primary contract, the secondary contract for contraction administration is:

Rebecca Ewald  
Village Manager  
[rewald@villageofshorewood.org](mailto:rewald@villageofshorewood.org)  
(414) 847-2701

- END DOCUMENT -

## **Responses to submitted questions:**

**Are you able to share a budget range or a "not to exceed" budget figure that could help us craft a right-sized approach?**

No budget has been specified. The two examples that were shared with the CDA for reference were noted to cost between \$26,300 and \$62,290. Both of those references were for larger municipalities in the area, however. It is our hope/expectation that firms bid on the project based on the project scope.

**Under *Deliverable* on page 4 in the RFP it says the draft plan should be submitted by 9/27/19 and in another place it notes four months from contract date. Please confirm the amount of time allotted to complete this study if awarded the contract.**

Four months from the contract date is correct for expected finalization. The RFP has been updated to indicate that the draft plan should be submitted three months from the start of the contract. The previous date was mistakenly left in from a previous version of the RFP that was to be issued earlier in the year.

**Does the CDA have a budget (or even a range) they are sharing with respondents?**

No budget has been specified. The two examples that were shared with the CDA for reference were noted to cost between \$26,300 and \$62,290. Both of those references were for larger municipalities in the area, however. It is our hope/expectation that firms bid on the project based on the project scope.

**Is the main client to be the Community Development Authority, the Village of Shorewood, or both entities?**

The main client is the Community Development Authority.

**From where is the funding coming to support this project (the CDA, the Village or another source)?**

The funding is coming from the Community Development Authority.

**Please clarify the deadline for proposals. The RFP states August 9 on page 1, but August 16 on page 9.**

The proposal deadline is August 9. It needed to be moved up to accommodate expected interviews and the other date was left by oversight. The RFP has been updated accordingly.

**Are proposers permitted to submit their sample contract, insurance certificate and key personnel resumes as attachments (outside the 10-page limit)?**

Yes, attachments do not count towards the 10-page limit.

**What is the budget that you have available for this effort?**

No budget has been specified. The two examples that were shared with the CDA for reference were noted to cost between \$26,300 and \$62,290. Both of those references were for larger municipalities in the area, however. It is our hope/expectation that firms bid on the project based on the project scope.

**Could you please clarify the proposal due date? Page 1 indicates August 9<sup>th</sup>, while Page 9 indicates August 16<sup>th</sup>.**

The proposal deadline is August 9. It needed to be moved up to accommodate expected interviews and the other date was left by oversight. The RFP has been updated accordingly.

**Likewise, could you provide a bit more clarification on the expected/desired timeframe to complete work? Page 1 and 9 note that a consultant will be selected on or around September 6<sup>th</sup>. Likewise, Page 7 denotes an expected contract period of 4 months. However, page 4 notes that ten hard copies and an electronic copy of the draft report is due no later than September 27, 2019, indicating a turnaround time of 3 weeks or less. Does the Village have a desired timeframe from engagement to draft delivery? We can certainly accommodate whatever is desired in our proposal, but an expedited timeframe of less than 3 weeks would have an associated impact on cost, so I want to make certain I understand the Village's expectations.**

Four months from the contract date is correct for expected finalization. The RFP has been updated to indicate that the draft plan should be submitted three months from the start of the contract. The previous date was mistakenly left in from a previous version of the RFP that was to be issued earlier in the year.

**Is there a budget range or not to exceed figure for this work?**

No budget has been specified. The two examples that were shared with the CDA for reference were noted to cost between \$26,300 and \$62,290. Both of those references were for larger municipalities in the area, however. It is our hope/expectation that firms bid on the project based on the project scope.