

REQUEST FOR PROPOSALS

Housing Assessment Study
Johnson County, Iowa

DATE: October 21, 2024



NOTICE

NOTICE IS HEREBY GIVEN proposals will be accepted for a detailed, technical, and actionable housing study. **Emailed proposals must be received by the Johnson County Planning, Development and Sustainability (PDS) Department no later than noon (12 p.m.) CT on DECEMBER 20, 2024.** Please email all proposals in a digital (PDF) format to Josh Busard, PDS Director, at jbusard@johnsoncountyiowa.gov. The email subject line must contain the phrase "Housing Assessment Study" and should identify the firm making the proposal.

Johnson County ("County") reserves the right to reject any and all proposals, to waive technicalities or irregularities, abandon or change the RFP process, and to enter into such contract as it shall deem to be in the best interest of the County.

SECTION I. INTRODUCTION AND BACKGROUND

Introduction

Johnson County, Iowa, has requested a scope of services and cost proposal for a housing assessment study with feasible and practicable recommendations that can be implemented for the unincorporated area of Johnson County and the six small, incorporated cities within the county, excluding the metro area consisting of the cities of Coralville, Iowa City, North Liberty, Tiffin and University Heights (hereafter "metro area"). The study is expected to commence no later than June 1, 2025.

Study Area

The areas to be analyzed include the unincorporated area of Johnson County and the six smaller incorporated cities (hereafter, "small cities"): Hills, Lone Tree, Oxford, Shueyville, Solon and Swisher. The unincorporated area includes several manufactured / mobile home parks and the traditional villages including the larger villages of Frytown, Joetown, and Cosgrove and six smaller villages. The manufactured / mobile home parks and village areas must be included in the study.

Particular attention must be given to the manufactured / mobile home parks in the unincorporated area. The manufactured / mobile home parks within the *metro* area should also be included in the County's study only if they are not sufficiently analyzed in other recent studies or the housing assessment study that the City of Iowa City is expected to complete by spring 2025 (more information is provided below about Iowa City's forthcoming study).

Study Need and Purpose

One of the priorities in the Johnson County comprehensive plan is equitable access to safe and affordable housing. This priority includes addressing the need for affordable housing supply and improving the quality and safety of existing and future housing for residents.

This housing assessment study will help inform housing, land use, transportation, and potentially other policy decisions of local elected officials as well as inform comprehensive or other planning documents for the unincorporated area and for each small city at those Cities' discretion. The study should do the following at a minimum:

- Define, consider and incorporate equity needs such as but not limited to housing stability, economic security, supportive community, inclusion (e.g. not just single-family focus) and concerns unique to renters.
- Forecast housing demand (2025 baseline) for the next 5, 10 and 20 years (to 2030, 2035 and 2045) and recommend housing types and amounts needed to satisfy future housing demand in the unincorporated area and each small city.
- Identify gaps, barriers and housing needs and potentially preferences (i.e. market analysis).
- Recommend feasible and attainable actions (e.g. funding to pursue, partnerships with cities, etc.) for local elected officials to consider and implement. Include examples from similar counties across the country. Examples of any affordable housing that incorporates sustainability (e.g. energy efficiency, indoor air quality, etc.) and resiliency are also desired.

If possible and feasible, the study may also consider and appropriately incorporate data and findings from the housing study that the City of Iowa City is actively completing for the metro area: leverage data and analysis, relate to market factors, consider mutual concerns, identify shared or complementary recommendations, etc. Iowa City's study is expected to be completed by spring 2025; the County study is expected to commence in the same time period or shortly after the conclusion of the Iowa City study. This timing will allow pertinent data from the Iowa City study to be used for the Johnson County Housing Assessment Study.

Budget

The anticipated budget is \$150,000.

Background

Located in eastern Iowa, Johnson County contains approximately 614 square miles, of which 564 square miles is unincorporated territory (i.e. land outside corporate city limits). Incorporated cities in the county (in order of population size) include Iowa City, Coralville, North Liberty, Tiffin, Solon, Lone Tree, University Heights, Swisher, Oxford, Hills and Shueyville. A small portion of the City of West Branch also lies within Johnson County.

Based on the recent U.S. Census 2020, Johnson County had a population (both incorporated and unincorporated areas) of 152,854 in 2020. Of the total population, 21,884 live in the unincorporated area. Johnson County is the fourth-largest county in Iowa by population and continues to be the second fastest-growing county in the state (16.8% population growth since 2010).

Consultant Selection Procedures

A selection committee will analyze and evaluate all properly submitted proposals in response to this request. The selection committee using the "Evaluation Criteria" listed in this RFP will rank all consultants. Top scoring consultants will be chosen for further evaluation, which may include interviews and presentations with those firms. Each proposal will be evaluated based on the Evaluation Criteria listed in Section IV.

SECTION II. SCOPE OF WORK REQUIREMENTS, TERMS AND CONDITIONS

Study framework

1. Gather Housing/Demographic/Community Pattern Information and Data

Use the most recent U.S. Census, American Community Survey (if needed), applicable national nonprofit databases (e.g. National Low-Income Housing Coalition, Urban Institute Upward Mobility Initiative, etc.) and state data to analyze and compare the population, demographic information, commuting patterns, employment centers, and household composition of each community over time. **The following population and demographic data, at a minimum, shall be provided for the unincorporated area and for each small city unless indicated differently:**

- i. Population characteristics and trends.
- ii. Household characteristics (size and composition, tenure and ownership status).
- iii. Income and Employment characteristics and trends (income, labor market characteristics, unemployment rate).
- iv. Household income and cost burden by housing tenure (i.e. renter, owner, etc.).
- v. Commuting trends and regional employment centers.
- vi. Estimate of number and type of families in need of housing assistance.
 - a. "Housing assistance" can include rental assistance, accessibility (finding a home as well as disability-related accessibility), eviction avoidance, first-time buyer assistance, and any other "assistance" measure considered meaningful by the consultant for this study.
 - b. Including an assessment of current and likely future senior housing needs and consideration for those who want to age in place or in their community.
- vii. Assessment of disproportionate housing needs by race and ethnicity.
- viii. Descriptions of the characteristics and needs of people who are homeless (chronically, hidden, episodically or transitionally) and people housed, but at risk of homelessness based on HUD definitions and other relevant local, state and federal definitions that may have longer timeframes than those cited by HUD (e.g. risk of housing loss beyond an imminent 14-day period).
- ix. Information regarding residents considered to be "under-housed" (i.e. housing unit size is insufficient for total number of occupants).
- x. Overall residential unit/building conditions assessment in the six small cities.
 - a. Base the inventory on an assessment for each small city.
 - b. Consider existing information in the Downtown Walkaround Reports created by the Iowa Economic Development Authority for (1) the small cities of Hills, Lone Tree, Oxford, and Swisher (March 2023); and (2) the small city of Solon (May 2023). These reports will be made available to the consultant selected to complete the project.
 - c. Consider information gleaned through public input sessions (see item 4, p. 5).
- xi. Inventory of vacant buildings and buildings with residential potential in only the six small cities and suitability of vacant and/or decaying units in those cities for rehabilitation to housing stock. (The sources cited in item x. above are among potential sources for data.)
- xii. Information that is pertinent to each manufactured / mobile housing park including, but not limited to, land ownership, demographics, on-site and/or local management, rent averages and trends, quality and safety, etc.

- xiii. Report on the condition of manufactured / mobile home parks in the unincorporated area and the six small cities. The report should include an assessment of infrastructure, amenities, roads, etc.
- xiv. Information regarding the type of housing, age, value and cost will be collected using Census data, recent sales information, and city/county records.
- xv. Review of any expiring affordable housing units and conversions to market rate that may impact affordability.
- xvi. Other factors that are influencing the housing market such as high cost of land, local and state regulations, rising mortgage/interest and insurance rates, public opposition and the availability of commercial and government services.

2. Consider and Leverage Information in Previous Housing Reports and Studies

- Forthcoming City of Iowa housing assessment study that is part of the [City Steps 2030](#) consolidated plan.
- Iowa City housing plans and studies dating back to 2016. These reports are available at the City's [Plans and Housing Studies webpage](#).
- [Johnson County Affordable Housing Report for 2023](#).
- Annual reports or other documents produced by housing coalitions or nonprofits in the area (e.g. [Affordable Housing Coalition of Johnson County](#), [Housing Trust Fund of Johnson County](#), etc.).
- Reports / descriptions of landlord and lending practices in the area related to housing access, procurement and affordability such as how renters' applications are vetted, loan approval criteria, etc.
- Reports related to area housing assistance programs as described in Section II, item 1.
- Other reports mutually deemed relevant.

3. Provide a City/County Policy and Initiatives History

Collect, review, analyze and recommend potential changes for current housing, land use, transportation and potentially other policies that apply to the unincorporated area and each small city. Collect and provide analysis of the following information:

- Small city/county building permit requirements and code enforcement practices.
- Housing initiatives currently or historically implemented.
- Comprehensive planning documents including but not limited to
 - Johnson County 2018 Comprehensive Plan, especially its Volume 3: Mid-Term Update 2024 available at <https://www.johnsoncountyiowa.gov/compplan>
 - [2022 Johnson County, Iowa, Economic Development Plan: Opportunities for the Unincorporated Area, Villages and Smaller Towns](#).
 - [Johnson County Community Health Improvement Plan 2023-2028](#) (housing is one of four pillars).
- Local zoning and development codes (county unincorporated area and the six small cities), to gain understanding of priorities for future growth and land use.
- Any school district information, policies or plans that may impact land use and decisions on school location (closings, new buildings, etc.).

4. Gather Public and Municipal Input

The consultant must make a diligent effort to directly engage with the County's and the small cities' elected officials and staff and shall conduct robust public input opportunities that engage the elected officials and staff, community organizers, business leaders, non-profit directors, and community members at-large. The engagement will include assessing concerns and soliciting recommendations and/or getting input on solutions to include in the plan.

Survey: One online survey (also available on demand in a paper format) must be made available to the public. The survey, both online and on demand, must be available in Arabic, English, French, Mandarin Chinese and Spanish.

Public input engagement sessions/meetings: The consultant is expected to make at least one trip covering several days of in-person contact in Johnson County. The consultant will host and lead meetings across the area. The public engagement across the area will include these meetings in addition to the survey:

- A minimum of four general input sessions for the public and other stakeholders. These input sessions would occur in different areas of the county and at different times in the process (e.g. two earlier in the process and two more later).
- Individual meetings (seven total) with the elected officials and staff of the County and each of the six small cities.
- Three small focus group meetings for designated stakeholders.
- Three individual meetings with designated stakeholders.

Recommendations setting: One additional in-person or virtual meeting to present and solicit input on proposed recommendations (see item 6 below) and then incorporating the input into the final report. (Please see item 7 below regarding a separate, in-person presentation of the final report.)

5. Provide a Gap Analysis

Consider the needs of the unincorporated area and each small city for future housing, based on the information gathered (Items 1, 2, 3 and 4 above) and demographic projections. Complete a housing gap analysis for the unincorporated area and for each small city which includes the following, at a minimum:

1. The number and percentage of households that are cost burdened by tenure and income tier.
2. The mismatch between household income and the level of affordability of the dwelling units occupied by households by income tier.
3. The gap in housing units, with specific attention to the gap in affordable units, that are needed to meet current and future housing demand and a projection of the different types and number of units, including affordable units, needed to fill the gap and future demand for the unincorporated areas and for each small city. This analysis should include manufactured housing.
4. Identification of non-housing priority needs for each small city.
5. Identification of mismatch between housing needs and adopted policy, plans and ordinances (e.g. more multi-family is needed, but current ordinance restricts).

6. Make Recommendations

Based on the information and input gathered, identify feasible and actionable recommendations and resources to assist the County and each small city in providing a variety of quality, safe housing for existing and future residents. In addition, identify obstacles to meeting any recommendations. The recommendations should be put in priority order based on input from the County, city elected officials and key stakeholders (whether this is done at an additional in-person or virtual meeting or through other means can be negotiated).

Recommendations may include, but are not limited to, these topics:

- 1. Policy or regulation implementation.
- 2. Identification of successful initiative or programs initiated by other cities that successfully filled housing gaps.
- 3. Potential funding sources or financing methods, including opportunities specific to the unincorporated area.
- 4. Potential partnerships among government, non-profits, developers, etc.

7. Report to County on Progress and Present the Final Report

Report to the County elected officials and staff on study progress (virtually or in-person). The final study report shall be presented in person.

Process and timeline

The County would like for the information gathering and data collection to begin no later than June 1, 2025. The first step will be to determine the availability of data in each community and the consistency of the data across communities. For consistency, documentation of information and data collection should be from the same time period for each community as much as possible. The preference is to use 2020 Census data, latest American Community Survey information available, and other data sources indicated in Section II. The data collection process will require working with the City and County staff and other sources such as real estate sales and rental data. The PDS Department, in conjunction with other City and County departments, will help identify the best sources to use for this data and work with entities to ensure the most accurate data is utilized.

Deliverables

- 1. Public engagement activities as listed above.
- 2. A final Housing Assessment Study for Johnson County, Iowa: Unincorporated Area, Manufactured Housing, Villages and Small Towns.
- 3. Maps and spatial data that best communicate the data and analysis. The maps and spatial data will be provided in an electronic format that can be used within the County’s GIS system.

Project RFP Schedule

The following is the schedule for the proposal submission and selection process (*deadlines are end-of-day Central Time (CT) unless otherwise indicated*):

Date RFP issued	October 21, 2024
Deadline for firms to submit questions	November 12, 2024
Answers posted to questions	November 22, 2024
Proposals submittal deadline	noon (12 p.m.) CT December 20, 2024
Notification to firms no earlier than	January 31, 2025

SECTION III. SUBMISSION REQUIREMENTS AND INFORMATION

Submission Due Date

Proposals will be accepted until **noon (12 p.m.) CT, December 20, 2024**. Submissions received after that time will not be considered.

Directions for Written Proposal Submission

Interested firms must email a digital copy (pdf format) of the proposal to Josh Busard, PDS Director, no later than the date and time noted above. **Submittals shall consist of the following items *provided in the following order*:**

1. A transmittal letter signed by the appropriate officer of the firm offering the proposal, certifying that the submittal and all information contained therein are accurate, and that the firm does not take exception to contract considerations listed in Section V of this document.
2. A concise and complete description of the work to be performed, specifically addressing the three deliverables and the Scope of Work, including:
 - i. A detailed work program and time schedule for the completion of all phases of the projects, including milestones for periodic review of the work.
 - ii. Communication plans: (1) for public engagement and (2) to report the progress of the data collection and status of the overall project.
 - iii. A budget showing detail for major project components including deliverables, travel, and public engagement.
3. A minimum of three (3) references from companies or agencies for which the firm provided similar services. Include all necessary contact information for the companies and the representatives who will be providing references. Also include the dates and location of services that were provided, and a brief description of the project(s). Please provide at least one example of past work (within the past two years) for this type of project. If the firm has not completed a particular project, please explain.
4. Information on the company/services, including a detailed description of the company, its location, and the services performed. Also, include how long the company has been performing those services and the number of people the company employs.
5. Identify who specifically from the firm and any sub-contractors will be working on the project, which portions of the Scope of Work and deliverables, and describe their capacity.
6. A fee schedule for the services requested. The proposed fee schedule should include line-by-line details of expenses. Quotation of fees and compensation shall remain firm for a period of at least ninety (90) days from the proposal submission deadline.
7. The proposal should include proof that the firm has adequate liability insurance.

Additional Information

Women- and minority-owned firms are strongly encouraged to apply.

Questions

All questions should be submitted by email no later than **November 12, 2024**, to Josh Busard, PDS Director, at jbusard@johnsoncountyiowa.gov. Questions will be answered via email to those who ask a question. **All questions and answers will be posted by November 22, 2024**, at this website:

<https://www.johnsoncountyiowa.gov/bids-and-proposals>.

SECTION IV. EVALUATION CRITERIA

The County's RFP evaluation team will consider the following items in their review:

- The qualifications of the firm and team members who will work on the project and any sub-consultants the firm intends to utilize, including the firm's and sub-consultants' knowledge and experience with rural housing assessment studies.
- The quality of similar projects that the consultant has completed. Previous experience conducting housing assessment studies in the State of Iowa is desired.
- The proposed cost of the project and associated fee schedule.
- Location of the firm and any sub-contractors.
- The firm's approach towards the completion of the Scope of Work and team capacity.
- The approach proposed for the public outreach and input solicitation process.
- The consultants' ability to utilize technology and data throughout the planning process.
- Information provided by references.
- Examples of, or working website links, to other completed plans or similar work.
- Results of interview, if conducted. (The County reserves the right to conduct interviews with individual firms if additional information is required to further assess the proposals.)
- Proposals will be additionally evaluated on the basis of the responsiveness, quality and completeness of the submission.

SECTION V. CONTRACT CONSIDERATIONS

General Considerations

The sections listed below are informational only; firms submitting proposals are hereby advised that any firm awarded a contract shall be subject to these conditions. Proposal packages are not required to contain any documents described within this section.

Indemnification

Any contract executed by Johnson County is subject to the following: "The awarded firm agrees to indemnify, defend, and save harmless, Johnson County, as well as its officers, agents and employees from any and all claims and losses to the extent caused by the negligent act, error or omission of the awarded firm resulting from the performance of this contract, except to the extent caused by the negligent acts of Johnson County or its officers, agents or employees."

Invoicing and Payment

Invoices shall be paid promptly by Johnson County unless any items thereon are questioned, in which case payment will be withheld pending verification of amount claimed and the validity of the claim. Standard payment terms are Net 30 Days from receipt of properly executed invoice(s).

Termination

Subject to the provisions below, the contract may be terminated by either party, upon thirty (30) days' advance notice to the other party.

Award Considerations

Johnson County may reject any or all proposals or submittals for such reason as it may deem proper. In acceptance of proposals or submittals, Johnson County will be guided by consideration of the interests of Johnson County. Johnson County also reserves the right to negotiate further with one or more of the firms as to any features of their proposals or submittals and to accept modifications of the work and price when such action will be in the best interests of Johnson County.

The individual signing this submittal hereby declares that no person or persons other than members of his/her own organization are interested in this project or in the contract proposed to be taken; that it is made without any connection with any other person or persons making a proposal for the same work and is in all respects fair and without collusion or fraud; that no person acting for or employed by Johnson County is directly or indirectly interested therein, or in the supplies or works to which it relates or will receive any part of the profit or any commission therefrom in any manner which is unethical or contrary to the best interests of Johnson County.

Use of Documents

As part of any resultant agreement, the selected firm shall grant to Johnson County a nonexclusive license to reproduce the Instruments of Service (e.g., reports and renderings), provided that Johnson County shall comply with all obligations, including prompt payment of all sums when due, under the agreement. The selected firm shall further grant a nonexclusive license permitting Johnson County to authorize other similarly credentialed design professionals to reproduce and, where permitted by law, to make changes, corrections or additions to the Instruments of Service for the purposes of implementing improvements to the project sites. The selected firm shall obtain similar nonexclusive licenses from its consultants consistent with the agreement.