



Request for Proposal (RFP)

City of Olympia | Capital of Washington State

AFFORDABLE HOMEOWNERSHIP RESEARCH STUDY

The City of Olympia (City) is seeking proposals from qualified consultant teams to submit proposals for research and recommendations to forward objectives of Olympia's Housing Action Plan. The plan recognizes an urgent need for more housing supply in the city, including increasing the number of units permanently affordable to low-income households. The City wants to identify opportunities to support long-term housing affordability through homeownership for low to moderate income households, which is also an opportunity for households to build wealth and generational wealth. Programs that expand homeownership can help address disparities resulting from a long history of discriminatory policies aimed at Black, Indigenous and People of color.

This request for proposals is for a study to help the City determine how to best support access to affordable homeownership opportunities. This study will provide recommendations to accomplish the City's goal of supporting partners and housing projects that involve land trusts, cooperatives, or other models that boost homeownership or stabilize the long-term affordability of the property for low to moderate income households. This analysis will help us understand best practices for city support of local organizations doing this work, as well as explore and identify capital funding mechanisms for City investment in these types of low-income affordable housing projects.

APPLICATION REQUIREMENTS

- Demonstrated experience researching local government housing programs
- Must respond to all required proposal elements
- Must apply by the submission deadline
- Specific experience and expertise to carry out the RFP objectives
- Experience assisting other cities similar to Olympia

The deadline for submission of proposals is **Monday, May 15, 2023 8:00 a.m Pacific Time.**

Only email submissions will be accepted.

PROJECT OBJECTIVES

This housing study and feasibility analysis will help the City identify concrete actions to support homeownership for low-income households. The City is looking for analysis of best practices, as well as outside the box solutions to leverage resources and opportunities for greatest impact.

This study will provide recommendations to help the City support partners and housing projects that involve land trusts, cooperatives, or other models that boost homeownership or stabilize the long-term affordability of the property for low to moderate income households. This analysis will help us understand best practices for city support of local organizations doing this work, as well as explore and identify capital funding mechanisms for City investment in these types of low-income affordable housing projects. The City also has an interest in exploring policies that help low-income households access homeownership and identify any needed supports to implement those policies.

The City has an interest in addressing disparities in homeownership for BIPOC, people with disabilities, single parents, and other populations. Proposed programs or policies should include considerations for inclusion of groups with challenges to accessing homeownership (e.g. people who lack a Social Security Number), and who have historically had less access to homeownership opportunities due to discriminatory practices.

Concept for Analysis

- Identify best practices for municipal involvement in supporting models that expand homeownership and stabilize long-term affordability of the property for low to moderate income households.
- Help us think outside the box to identify concepts for a creative, realistic and impactful low-income housing project (e.g., cottage development for low-income seniors).
- Identify ways the City can help local organizations doing this work build capacity to scale up their efforts and compete for funding in a viable way. Conduct outreach to assess their needs.
- Identify available sources of capital and funding mechanisms that would enable the City to support these types of partners and projects. Include assessment of options that the City is currently not using to analyze what is required under authorizing statutes, limitations and drawbacks.

- Include exploration of private philanthropy models, community development financial institutions, use of bonds, and low-interest loan options.
- Identify existing or potential down payment assistance programs for first-time home buyers and low-income households that are or could be made available in Olympia. Assess the value and limits of these programs in the current market, along with opportunities to pair them with affordable home ownership programs that may be implemented by the City and partners.
- Include options for a city program to help convert older mobile home parks into affordable housing projects under a land trust or cooperative model, or upgrading mobile homes that need to be replaced with something new.
- Include strategies to qualify more low-income prospective homebuyers for ownership (such as credit counseling, debt repair, and financial literacy).
- Include feasibility and supports needed for an effective Tenant Opportunity to Purchase ordinance, Right of First Refusal, notice of sale of low-income housing, or similar policies.
- Identify any successful models for rent-to-own programs or policies.
- Identify other communities doing well in similar endeavors and creating meaningful impact.
- Identify other potential partners.
- The assumption is projects could be located anywhere within Olympia or its urban growth area.
- Considerations should be consistent with Washington State law.

Background

One of the strategies in Olympia's [Housing Action Plan](#) is to 'Increase the Supply of Permanently Affordable Housing for Households that make 80 percent or less of area median income.' Some identified actions relating to support for homeownership or long-term affordability include:

1.a. Donate or lease surplus or underutilized jurisdiction-owned land to developers that provide low-income housing, which the City has had success with and wishes to continue on a proactive basis.

1.b. Fund development projects that increase low-income housing through grants or loans, which the City does through a Home Fund sales tax, however those funds are currently directed at permanent supportive housing, a specific intervention for people experiencing homelessness.

1.g. Partner with low-income housing developers to expand homeownership opportunities.

1.h. Provide funding for non-profit organizations to buy income restricted units proposed to be converted to market-rate housing which the City has does through a Home Fund grant with Homes First.

1.i. Provide funding for low-income and special needs residents to purchase housing through community land trusts.

2.g. Establish a down payment assistance program, which the City may be interested in partnering with the Washington State Finance Commission to carry out.

A challenge is that the City does not have a significant dedicated funding source to support affordable housing partners and projects. In early 2023, the City entered into an Interlocal Agreement with Thurston County to combine the City's Home Fund and newly adopted County Home Fund in order to create a larger funding stream for affordable housing projects. All proposed projects would need to also include newly identified revenue to support the projects.

Thurston County is in the process of completing the [Assessment of Fair Housing](#), which highlights the stark disproportionality between white homeowners and homeowners of color. The goals to be proposed in the plan will aim to address those systemic inequalities. This study will incorporate the findings of that assessment and ensure all new projects are prioritizing the goals set out in the finalized assessment.

Deliverables

The selected firm will provide a written report and presentation of options and opportunities for city staff, City Council's Land Use & Environment Committee and the full City Council to consider. Include how these options and opportunities would work in Olympia, analysis of the effectiveness of each proposed activity, as well as resources to implement proposed activities and possible funding sources.

SCHEDULE

The following schedule is to inform vendors of the estimated timetable of the RFP response preparation and evaluation. Please note the following dates when preparing

your response to the RFP. The City reserves the right to modify this schedule at its discretion; deadlines for questions and proposal submissions will never shorten.

SCHEDULE DATES	DATE
Issuance of Request for Proposal (RFP)	Monday, April 10, 2023 by 5:00 p.m. Pacific Time
Deadline for questions	Wednesday, April 26, 2023 by 5:00 p.m. Pacific Time
Responses to questions with Question & Answer addenda	Wednesday, May 3, 2023 by 5:00 p.m. Pacific Time
Proposal submission deadline	Monday, May 15, 2023 by 8:00 a.m. Pacific Time
Finalist(s) selected and notified	Week of May 22, 2023
Contracted work begins	Week of June 12, 2023

CONTRACT AND COMPENSATION

An ideal candidate will be able to complete the study and provide recommendations in 6 months. The selected consultant will be required to enter into a contract with the City for the agreed upon project timeframe. The ideal budget will not exceed \$50,000; however a proposed budget that exceeds \$50,000 may be considered based on the strength of the proposal. The City may award multiple contracts or choose not to award. These funds are available to award directly after contracting in 2023.

The City of Olympia's Professional Service Agreement (PSA) will be the contract document for these services. A sample of the PSA is available for review on the City's website (https://www.olympiawa.gov/government/contracts_purchasing/index.php). All consultants are advised that when applicable, the Equal Benefits Compliance Declaration Form will be used on this project. These contracts are subject to certification of equal benefits provided to all employees.

SUBMISSION REQUIREMENTS

Proposals must be emailed to Christa Lenssen at clenssen@ci.olympia.wa.us **no later than 8:00 a.m. Pacific Time on Monday, May 15, 2023.**

INSTRUCTION TO PROPOSERS

Questions related to this RFP must be submitted in writing to Christa Lenssen at clenssen@ci.olympia.wa.us. **Questions via telephone will not be accepted.** All questions related to this RFP must be received by Wednesday, April 26, 2023 at 5:00 p.m. Pacific Time. Questions received after this date may not be answered. Questions

To Make Public Records Request: To obtain records related to this RFP via a public records request, please visit our [Public Records webpage](#). Public records fees apply.

SCORING CRITERIA

The City may select more than one respondent to receive an award. Proposals will be evaluated based on the following criteria (the application questions are attached in Exhibit C):

1. Demonstrate timeliness (10 percent of score)

Timeliness is defined as a proposal that can meet as many project objectives as quickly as possible. Your response to this question will be our basis for the timeframe for contract negotiations. Timeliness should include time for you to present draft and final results to staff and the Council's Land Use Committee followed by a presentation to the full City Council.

2. Experience of Consultant (40 percent of score)

Please detail your firm's experience producing similar projects for other local governments, including hyperlinks or PDF attachments to that research. Recent experience in Washington is preferred, but not required. Experience should include brief backgrounds of staff who will be involved in this project. Curriculum vitae or resume are not required but may be requested at a later date.

3. Cost (10 percent of score)

Projects will be expected to maximize cost effectiveness in this research. Your cost proposal must include estimates of staff time and staff rates dedicated to this project. Your proposal must include time to complete all of study activities within the Council appropriated budget.

4. Responsiveness of Proposal to Project Objectives (40 percent of score)

Applicants will be expected to clearly state how they intend to meet the objectives of the proposal. Specificity in each response along with goal alignment and supported methodology will be required and scored the highest.

Selection Criteria Scoring Summary

Category	Points
Demonstrate timeliness	10
Experience of Consultant	40
Cost	10
Responsiveness	40
Total possible score	100

All applications must include:

1. A scan of the signed Statement of Compliance With Nondiscrimination Requirement (Exhibit A)
2. A scan of the signed Equal Benefits Compliance Declaration (Exhibit B)
3. A Microsoft Word narrative response to the application questions (Exhibit C)

After application submittal, staff may arrange an interview for those respondents that are short listed or select from submitted written material.

DISCRETION AND LIABILITY WAIVER

Any errors discovered after RFP submission deadline must remain and cannot be adjusted.

It is the sole responsibility of the respondent to assure that they have received the most current RFP and addenda.

The City reserves the right to reject all proposals or to request and obtain, from one or more of the respondents, supplementary information as may be necessary for the City to analyze the proposals pursuant to the selection criteria contained in this RFP.

The respondent, by submitting a response to this RFP, waives all right to protest or seek any legal remedies whatsoever regarding any aspect of this RFP.

The City is not to be responsible for any costs incurred by the respondents in preparing, submitting or presenting its response to the RFP.

The City reserves the right to negotiate with the selected respondent(s) the exact terms and conditions of the contract or agreement.

The selected respondent(s) will be an independent contractor, not City employee.

The City reserves the right to cancel this RFP at any time.

All RFP documents are public record and subject to public disclosure.

The successful respondent will be asked to sign a [Contract](#) with the City; the City will not sign any company's service agreement, contract or any other form of agreement. The City does reserve the right to extract certain language from a company's agreement and incorporate it into the City contract, if agreeable to both parties

The insurance certificate required, as detailed within the [contract template](#), shall be submitted upon notification of award.

Washington State Law and Venue: Any resulting contracts, (if any) must be construed under the laws of the State of Washington. All claims, actions, proceedings, and lawsuits brought in connection with, arising out of, related to, or seeking enforcement of resulting contracts must be brought in Thurston County, Washington.

Consultants on City contracts estimated to \$50,000 or more are required to comply with Olympia's Equal Benefits Ordinance, and Equal Benefits Compliance Declaration (Exhibits A & B).

DIRECTIONS FOR DELIVERY OF APPLICATION (PROPOSAL RESPONSE)

The deadline for submission of proposals is **Monday May 15, 2023 by 8:00 a.m. Pacific Time**. Application documents must be emailed to Christa Lenssen, at clenssen@ci.olympia.wa.us.

Exhibit "A"

STATEMENT OF COMPLIANCE WITH NONDISCRIMINATION REQUIREMENT

The Olympia City Council has made compliance with the City's *Nondiscrimination in Delivery of City Services or Resources* ordinance (OMC 1.24) a high priority, whether services are provided by City employees or through contract with other entities. It is important that all contract agencies or vendors and their employees understand and carry out the City's nondiscrimination policy. Accordingly, each City agreement or contract for services contains language that requires an agency or vendor to agree that it shall not unlawfully discriminate against an employee or client based on any legally protected status, which includes but is not limited to: race, creed, religion, color, national origin, age, sex, marital status, veteran status, sexual orientation, gender identity, genetic information, or the presence of any disability. Listed below are methods to ensure that this policy is communicated to your employees, if applicable.

- Nondiscrimination provisions are posted on printed material with broad distribution (newsletters, brochures, etc.).
- Nondiscrimination provisions are posted on applications for service.
- Nondiscrimination provisions are posted on the agency's web site.
- Nondiscrimination provisions are included in human resource materials provided to job applicants and new employees.
- Nondiscrimination provisions are shared during meetings.

Failure to implement at least two of the measures specified above or to comply with the City of Olympia's nondiscrimination ordinance constitutes a breach of contract.

By signing this statement, I acknowledge compliance with the City of Olympia's nondiscrimination ordinance by the use of at least two of the measures specified above.

(Signature)

(Date)

Print Name of Person Signing

Alternative Section for Sole Proprietor: I am a sole proprietor and have reviewed the statement above. I agree not to discriminate against any client, or any future employees, based on any legally protected status.

(Sole Proprietor Signature)

(Date)

Exhibit "B"
EQUAL BENEFITS COMPLIANCE DECLARATION

Contractors or consultants on City agreements or contracts estimated to cost \$50,000 or more shall comply with Olympia Municipal Code, Chapter 3.18. This provision requires that if contractors or consultants provide benefits, they do so without discrimination based on age, sex, race, creed, color, sexual orientation, national origin, or the presence of any physical, mental or sensory disability, or because of any other status protected from discrimination by law. Contractors or consultants must have policies in place prohibiting such discrimination, prior to contracting with the City.

I declare that the Consultant listed below complies with the City of Olympia Equal Benefits Ordinance, that the information provided on this form is true and correct, and that I am legally authorized to bind the Consultant.

Consultant Name

Signature

Name (please print)

Date

Title

Exhibit "C"

2023 Affordable Homeownership Research Application Questions

Responses must be submitted for all questions for the application to be considered.

1. Submitting organization name:

2. Name of primary contact for this application:

3. Telephone number, email, and mailing address for submitting organization:

4. Name and brief experience of applicant:

5. Name and brief experience of staff involved in this project. Include the percentage of time each staff member would be working on this project, ie; Program Manager 15%, Program Coordinator 65%, Research Assistance 20%. Resumes and CV are not necessary, but may be requested at a later date:

6. Include a proposed scope of work for housing study:

7. Include an estimated cost and budget breakdown for this contract: