



## **Request for Proposals**

### **Consultant to Conduct a Housing Study and Needs Assessment**

**PROPOSALS WILL BE RECEIVED UNTIL**

**12:00 Noon, Friday, April 7, 2017**

**in**

**Purchasing Department, City Hall Building  
101 North Main Street, Suite 324 Winston-Salem, NC 27101**

### **ADVERTISEMENT FOR PROPOSALS**

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Sealed proposals endorsed **Consultant to conduct a Housing Study and Needs Assessment** for the City of Winston-Salem will be received by the City/County Purchasing Department in Suite 324, City Hall Building, 101 North Main Street, Winston-Salem, NC, **until 12:00 Noon, Friday, April 7, 2017**. Instructions for submitting proposals and/or receiving the complete RFP document specifications may be obtained during regular office hours at the same location, or by contacting Jerry Bates via email [jerryjb@cityofws.org](mailto:jerryjb@cityofws.org) (Email is preferred) or phone 336-747-6939. The City reserves the right to reject any or all proposals.

Jerry Bates  
Purchasing Director

## **City of Winston-Salem Request for Proposals Housing Study and Needs Assessment**

The City of Winston-Salem seeks proposals for a Consultant to conduct a Housing Study and Needs Assessment. The study is to include an assessment of existing housing conditions, demographics and market demands (present and future), identification of existing and future housing needs in the county, identification of critical housing gaps and issues, and identification of possible financing opportunities to address the needs.

### **Background**

Winston-Salem is the county seat of Forsyth County, North Carolina. With a 2015 estimated population of 241,218, it is the second largest municipality in the Piedmont Triad region and the fifth largest city in the state. The town of Salem was established by the Moravians – a devout, religious group originally from Eastern Europe – in 1766. Their pioneering work as fine craftsmen and artisans of pottery, tannery, iron works, cloth and furniture making established the town of Salem as a thriving, sought-after trade center. The town of Winston was founded in 1851 and, thanks to the entrepreneurial spirit of business tycoons such as R. J. Reynolds and the Hanes family, grew in industrial and financial importance, ultimately emerging as a national leader in tobacco and textile manufacturing. Winston and Salem merged in 1913 to form Winston-Salem.

Early success as an industrial center brought wealth to the community that fueled the start-up of other successful businesses, among them, Piedmont Airlines (later absorbed by USAir), Krispy Kreme Doughnut Corporation, T.W. Garner Food Company (makers of Texas Pete hot sauce), and Goody's headache powders. Winston-Salem is also home to six colleges and universities including Wake Forest University, including its renowned medical center; Salem College, the longest, continuously running women's college in the U.S.; Winston-Salem State University, a historically black college and university; and the University of North Carolina School of the Arts, training professionals in music, dance, theater, and film making.

Over the past 20 years the local economy has changed as manufacturers shifted to a global supply chain, tobacco use declined, and banks consolidated. Services, such as health care and education, now predominate. In addition, former Reynolds manufacturing sites have been renovated into the Wake Forest Innovation Quarter, with a focus on biotechnology, and downtown has flourished.

In terms of housing, from the 1950s through the 1990s the City invested a significant amount of effort and resources in redeveloping lower income neighborhoods. Since then the focus has been more to target individual housing units or households, such as through code enforcement, homeowner rehabilitation, homebuyer assistance, and rental assistance. Private investment since the recession has been mostly on higher end developments, including in downtown. There is concern that lower- and middle-income neighborhoods should receive more focus for investment and that housing affordability downtown should be improved.

The City is a Community Development Block Grant entitlement city and the lead entity for the Winston-Salem/Forsyth Housing Consortium, a participating jurisdiction in the HOME Investment Partnership Program.

### **General Scope of Work**

The mission of the Community Development Department is to administer programs in a manner designed to fulfill the objectives of Legacy 2030 (the City and County's comprehensive plan) and of the Winston-Salem/Forsyth County Consolidated Housing and Community Plan. The Consolidated Plan for program years 2019-2023 is due to HUD May 15, 2018, and a community profile and housing needs assessment are required as part of the plan. Also, for local funding sources, the City has adopted guidelines for affordable workforce housing for households with incomes from 50-120% of area median income. The City recognizes that in order for the community to succeed and grow economically, it must understand its housing situation and needs.

The City of Winston-Salem desires to have a comprehensive housing plan for encouraging and promoting a variety of housing types and levels of affordability. The plan will be used to allocate and prioritize resources for housing development and redevelopment, including but not limited to CDBG, HOME, and other grant funds, local revenues, and other resources.

The scope of work includes:

1. Housing Market Assessment – The consultant shall perform the following, utilizing Winston-Salem and Forsyth County as the geographical base.
  - a. Provide trend analysis of changes in the demographics, housing inventory, and submarkets that have evolved.
  - b. Determine the demand for housing with projections for the next ten (10) years by age and size of household, income and tenure.
  - c. Provide an inventory of existing affordable and workforce housing, both publicly supported and in the private market.
  - d. Examine the adequacy of the existing housing stock for meeting present and future housing needs reviewing such factors as cost, tenure, physical and locational characteristics. Assess these factors for i) Forsyth County, ii) Winston-Salem as a whole, iii) downtown Winston-Salem, iv) selected planning districts, and v) selected population submarkets.
  - e. Determine which household submarkets are to be assessed (e.g., female-headed, elderly, etc.) and estimate which submarket needs are not being met and are likely to remain unmet in the private market. Calculate the supply and demand for low/moderate income households, for workforce households, and for assisted/non-assisted housing units.
  - f. Estimate the number and bedroom size of units available and affordable to particularly vulnerable populations (e.g. homeless persons and disabled persons) with incomes under 30% of Area Median Income.
2. Assessment of Housing Cost Factors – The consultant shall:
  - a. Examine the components of housing costs as it relates to land, site improvements, design, financing, land use regulations and government review and processing.
  - b. Examine factors that hinder various types of housing opportunities.
  - c. Assess how transportation costs affect housing affordability (H+T).
  - d. Assess the cost effectiveness of various tools for housing, e.g. redevelopment vs. neighborhood conservation, rehabilitation, new construction, adaptive reuse, historic preservation, transit-oriented development.
3. Resources – The consultant shall:
  - a. Identify, assess and catalog public and private funding mechanisms and approaches that are currently used and those also available.
  - b. Examine the roles and responsibilities of the private sector, and public and non-profit organizations involved in housing activities.
  - c. Identify the legal, organizational, institutional, and other constraints and opportunities for private, public and non-profit organizations in financing and developing housing activities.
  - d. Describe the financial capacity of the City to engage in housing activities. Identify the potential of untapped funding sources including private resources, governmental and any other revenue generating resource mechanisms of the City.
4. Recommendations – The consultant shall:
  - a. Propose strategies to encourage diverse housing types and affordability levels throughout the city.

- b. Provide a suggested plan to fill housing gaps, including a rationale for prioritization of projects for funding.
- c. Propose funding and investment strategies.
- d. Propose a process to present findings and obtain feedback.
- e. Provide an investment assessment tool or toolkit, such as a “Housing Scorecard” to enable the City to make ongoing assessments of how well the community is meeting affordable and workforce housing needs compared to other municipalities in the state and region.

5. Attend the City of Winston-Salem committee meetings to present results, as requested.

### **Roles and Responsibilities**

Designated staff of the City’s Community Development Department will be the point of contact for the Consultant. The Consultant will be responsible for conducting the community consultation process, which will consist of a minimum of one public meeting, collecting and analyzing data, and completing the assessment as described in the scope of work.

The City will provide the following services as part of the total project.

- 1. Provide access to present and historic housing records (i.e., code enforcement, building and zoning files/records), and maps.
- 2. Existing planning documents, which are available on the City’s website:
  - a. Legacy 2030 (comprehensive plan)
  - b. Unified Development Ordinance
  - c. Area plans
  - d. Downtown plan
  - e. Minimum Housing Code
  - f. 2014-2018 Consolidated Plan
  - g. WSTA bus route changes
- 3. Other plans anticipated or in progress, once available:
  - h. Assessment of Fair Housing (to be completed by October 4, 2017)
  - i. Continuum of Care Strategic Plan (to be completed by October 1, 2017)
- 4. Assist in project management and administration. Staff will attend all meetings with the consultant and assist the consultant as a liaison between the public and the consultant.
- 5. Staff will coordinate and schedule all meetings involving the consultant. City staff will mail all agendas, meeting minutes, and meeting information packets unless otherwise arranged with the Consultant.

### **Timeline**

The City and Consultant will negotiate mutually agreeable timelines for commencement and completion of the project, as well as for scheduling of specific tasks. It is anticipated that the Consultant will be selected by May 15, 2017. The target for completion of the study, including presentations to public officials, is October 31, 2017.

To obtain the complete proposal document or receive instructions for submitting proposals contact Jerry Bates via email [jerryjb@cityofws.org](mailto:jerryjb@cityofws.org), (email preferred), phone 336-747-6939, or visit the Purchasing Department at same location from 8:00 A.M. to 5:00 P.M. Monday through Friday.