

ADDENDUM 1



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**

March 24, 2017

Please acknowledge receipt of this Addendum and include with your proposal.

Company

Authorized Signature

Date

QUESTIONS/RESPONSES

The following questions have been received with City responses provided for this service

1. On page 8, Section 1.d, the RFP speaks of five separate analytical views. When it addresses “selected planning districts” and “selected population submarkets”, can you tell us which planning districts, of all the planning districts, and which population submarkets?

Planning districts are described in item 1.d of the RFP and include “i) Forsyth County, ii) Winston-Salem as a whole, iii) downtown Winston-Salem, [and] iv) selected planning districts...” One additional planning district which is to be considered by the consultant is the existing Neighborhood Revitalization Strategy Area (NRSA). The City will consider any additional planning districts suggested by the consultant. Note that the City is being required by HUD to submit an updated NRSA with the 2019-2023 Consolidated Plan. However, information on the current NRSA is available in the 2016-2017 Annual Action Plan, which is found at <http://www.cityofws.org/Departments/Community-Development/Planning/Reports>.

2. Will this Housing Study and Needs Assessment be used for, or conducted in cooperation with the Forsyth Housing Consortium as well?

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Yes. The City is the Lead Entity for the HOME Participating Jurisdiction (Winston-Salem/Forsyth Housing Consortium), which includes Winston-Salem, Forsyth County and all other municipalities in Forsyth County. The study will cover the entire geographic area of the jurisdiction.

3. On page 8, Section 1.e, the RFP speaks of “householder submarkets”, are these the same as “selected population submarkets? If not, can you please define them?

Regarding population submarkets, the study should include the population and submarket types described in the Consolidated Plan regulations at 24 CFR 91, which require an estimate of the number and type of families in need of housing assistance based on the following categories:

- A. Extremely low-income [30% AMI], low-income [50% AMI], moderate-income [80% AMI], and middle-income [95% AMI] families;**
- B. Renters and owners;**
- C. Elderly persons;**
- D. Single persons;**
- E. Large families;**
- F. Public housing residents;**
- G. Families on the public housing and Section 8 tenant-based waiting list;**
- H. Persons with HIV/AIDS and their families;**
- I. Victims of domestic violence, dating violence, sexual assault, and stalking;**
- J. Persons with disabilities; and**
- K. Formerly homeless families and individuals who are receiving rapid re-housing assistance and are nearing the termination of that assistance.**
- L. Persons who are homeless or at risk of homelessness.**
- M. Persons with other special needs, including persons who are not homeless but require supportive housing, including the elderly, frail elderly, persons with disabilities (mental, physical, developmental), persons with alcohol or other drug addiction, persons with HIV/AIDS and their families, public housing residents, and any other categories the jurisdiction may specify, and describe their supportive housing needs.**

The City will also consider inclusion of other submarkets which may be suggested by the consultant.

It should be noted that the City of Winston-Salem administers the Winston-Salem/Forsyth County Continuum of Care, serves as the Collaborative Applicant for Continuum of Care grant funds, and administers the Homeless Management Information System (HMIS) locally. The City will work with the consultant to provide data on homeless persons and their needs.

4. How might this prospective task be affected if the CDBG and/or HOME budgets are curtailed in upcoming President Trump budgets?

The scope of work requires the consultant to make recommendations about resources and investment. Recommendations on a rationale for prioritization of projects for funding is included in the scope of work.

5. On page 9, Section 4.e, the request is for a “Housing Scorecard”, comparing workforce housing needs to other municipalities in the state and region. Can you specify those other municipalities? Would this require tracking each of these communities as well?

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We would expect the consultant to research the major cities in North Carolina to determine comparable “Housing Scorecard” best practices. These cities may include but not be limited to Charlotte, Raleigh, Greensboro and Durham, North Carolina. We would expect the consultant to test the tool with current data as part of the contract. However, we do not expect the consultant to continue tracking the data after completion of the scope of work.

6. What is the name of the contractor who has been hired to conduct the Winston-Salem Assessment of Fair Housing that is intended to be completed by October 4, 2017?

Mosaic Community Planning, LLC

7. Do you have a budget, or budget range, for this Housing Study and Needs Assessment?

The City seeks responsive bids with reasonable costs, based on products and services that fulfill the requirements of the RFP. The contract must be approved by the City Council.

8. Will this be a fix price or a cost reimbursement contract?

This will be a fixed price contract based on the proposed cost of the accepted proposal. Funds will be disbursed based on agreed-upon project milestones, which will include documentation of products and services delivered to the City and found by the City to meet the requirements of the scope of work.

9. Is there a budget range that the City would like the cost proposal to fall within?

Please see the response to question 7 above.

10. What is the page limit for the proposal response?

Although there is no page limit, the City respectfully requests complete but concise responses to the RFP, noting that a committee is anticipated to review the proposals on a limited timeline.

11. What is the desired time period for data analysis – is it the same as the number of years for the Con Plan (2019 – 2023)?

Yes, the needs assessment should be based on the period of the Consolidated Plan to be developed for City fiscal years 2019 to 2023.

12. Can you point us to the “guidelines” for affordable workforce housing, targeting households in the 50 – 120% AMI?

Yes. The “Guidelines for Affordable Workforce Housing Assisted with City Funds” are attached.

13. Are there specific “selected” planning districts the City is interested in focusing on for this study?

Yes. Please see the response to question 1 above.

14. Are submarkets defined the same as “special needs populations” which also include individuals with mental and physical disabilities?

Yes. Please see the response to question 3 above.

15. To what extent does the City want the properties and programs run by the Winston-Salem Public Housing Authority to be included in the study?

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The properties and programs operated by the Housing Authority of the City of Winston-Salem (HAWS) are to be included in the study. The scope of work described in the RFP requires an examination of the existing housing stock, which is consistent with the housing market analysis requirements described in the Consolidated Planning regulations at 24 CFR 91.210. For reference regarding HAWS, the consultant should see 24 CFR 91.210 (b) (1) and (b) (2).

16. Has the City established a level of funding for the study? It would be helpful to have funding range when crafting the proposed approach.

Please see the response to question 7 above.

CITY OF WINSTON-SALEM GUIDELINES FOR AFFORDABLE WORKFORCE HOUSING ASSISTED WITH CITY FUNDS

The City of Winston-Salem receives Community Development Block Grant (CDBG) and HOME Investment Partnership (HOME) funding annually from the U.S. Department of Housing and Urban Development (HUD), on an entitlement basis. In addition, the City issues General Obligation Bonds after approval by the voters and receives program income and the fund balance from one-half cent of the sales tax. The City may use these funds to support the construction and rehabilitation of multi-family rental workforce housing.

Guidelines

1. Projects funded with federal funds must meet the applicable requirements detailed in the regulations for that program, which may include restrictions, based on income, on who can lease rental units and maximum rents that may be charged to tenants. They also include general requirements applicable to all federal programs, such as environmental review, executive orders, Office of Management Budget Circulars, Davis-Bacon, lead-based paint, and Section 3. Projects funded with G.O. Bonds must comply with requirements outlined in the bond order.
2. The City understands that when projects are funded with other federal, state, local, or private funding sources the City may not hinder the developer or owner from complying with the requirements of those funding sources and that the City may be limited in the restrictions it can impose. Such funding sources may include, but not be limited to, Low Income Housing Tax Credits, Historic Tax Credits, Section 202 (elderly), Section 811 (disabled), public housing, and Federal Home Loan Bank.
3. When locally derived funds are the only source of City funds, the City will place restrictions on its locally derived funds. General information on these restrictions is described below:
 - a. The City will determine a percentage of rental units that must be leased to workforce households. In general, at least 5% of total units must be leased to households whose incomes are 50-80% of area median income, and at least 5% of total units must be leased to households whose incomes are 80-120% of area median income. If for some reason, these percentages cannot be supported by the proposed financing plan, the developer may suggest, for the City's consideration, other combinations that still support affordable housing as part of the overall project.
 - b. The time period that the income limit will be enforced is consistent with the terms of the City financing; however, in no case will the term be less than 15 years.
 - c. This requirement shall be agreed upon contractually with the property owner and noted as a land use restriction.
 - d. City financial assistance generally will be in the form of a loan, provided on a "gap" basis once all other available funding is applied to the project cost. A final determination of the loan terms will be based on a finalization of cost and other financing sources to assure that no more funding is provided than necessary.