



Chamber of Commerce

To: Prospective Contractors
From: Kevin Gartland, Executive Director
Date: March 8, 2017
Re: RFP for Affordable Workforce Housing Plan

The Whitefish Chamber of Commerce, in partnership with the City of Whitefish, the Whitefish Housing Authority and the Whitefish community, is seeking proposals from qualified firms, teams and individuals for the preparation of a comprehensive Affordable Workforce Housing Implementation Plan for Whitefish, Montana and the surrounding area, defined as the 59937 zip code.

The Plan will incorporate the findings and recommendations of the 2016 Whitefish Workforce Housing Needs Assessment, and will identify/recommend tools, strategies, policies, programs and priorities for addressing those needs, including implementation measures that can be put into place immediately in an effort to substantially increase our production of quality, affordable workforce housing over the next 5-10 years.

A full copy of the RFP is enclosed for your consideration. Please note that Proposals are due in our office no later than 5 p.m. on Monday, April 3. If you have any questions or need additional information, please contact me via email at kevin@whitefishchamber.org.

Thank you for your consideration and interest!



REQUEST FOR PROPOSALS

FOR PROVIDING AN

Affordable Workforce Housing Plan

for

Whitefish, Montana

*PROPOSALS ARE DUE NO LATER THAN THE CLOSE OF BUSINESS ON
Monday, April 3, 2017*

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1. Introduction and Background

The Whitefish Chamber of Commerce, in partnership with the City of Whitefish, the Whitefish Housing Authority and the Whitefish community, is seeking proposals from qualified firms, teams and individuals for the preparation of a comprehensive Affordable Workforce Housing Implementation Plan for Whitefish, Montana and the surrounding area, defined as the 59937 zip code. The Plan will incorporate the findings and recommendations of the 2016 Whitefish Workforce Housing Needs Assessment, and will identify/recommend tools, strategies, policies, programs and priorities for addressing those needs, including implementation measures that can be put into place immediately in an effort to substantially increase our production of quality, affordable workforce housing over the next 5-10 years.

The background provided in this Request for Proposals (RFP) is sufficient to enable the preparation and submission of a proposal for services. The Whitefish Chamber of Commerce shall be the sole point of contact for this RFP and contract. The Chamber is not liable for any cost incurred by prospective contractors in the preparation of or submission of proposals pursuant to this RFP. The Whitefish Chamber is an affirmative action/equal opportunity organization that selects contractors without regard to race, religion, color, ethnicity, gender, age or disabilities. The Chamber reserves the right to reject any and all proposals, and to waive any irregularities and technicalities in the submission and/or selection process.

The Whitefish Community

Whitefish is a highly involved, proactive community located in rural northwestern Montana (Flathead County). The city encompasses 6.71 square miles in the northern Flathead Valley, and is home to 6,357 full-time residents (2010 census).

While there is significant diversity in the area's base economy, it is heavily weighted toward tourism and outdoor recreation, fueled primarily in the summer months by the city's proximity to Glacier National Park (25 miles east), and in the winter by Whitefish Mountain (ski) Resort. The City welcomes more than 600,000 visitors each year. US Highway 93 runs through the city in a north-south direction; Highways 40 and 2 connect Whitefish to the neighboring communities of Columbia Falls and Kalispell. The Burlington Northern & Santa Fe Railway runs through Whitefish with approximately 50 freight trains passing through the community each day. Whitefish is also a major stop on Amtrak's "Empire Builder" passenger train service between Seattle and Chicago, with one eastbound and one westbound train stopping in Whitefish daily.

The city's "peak" tourist season is mid-June to mid-September, when Glacier National Park is in full operation and local lakes, rivers and streams are busy with boaters, floaters and anglers.

The winter ski season runs from early December through early April, and continues to grow in popularity ... Ski Magazine has ranked Whitefish Mountain Resort in (or near) the “Top 10” of North America ski resorts in each of the last five years.

Historically, Whitefish has had a railroad, timber and agriculture-based economy. But visitation and outdoor recreation – along with real estate construction and sales – have dominated the economy in recent decades. The community’s proximity to Canada was a boon in the recession years, as Canadian business flowed to Whitefish to capitalize on favorable currency exchange rates. The Whitefish area has also become a “hotspot” for second homeowners and retirees, regularly winning kudos as the top retirement area in Montana, and one of the top-rated retirement communities in the northern Rocky Mountain region.

As the area has developed into a premier retirement, recreation and visitation destination, nearly all of the community’s new housing construction has been targeted at (and marketed to) high-end visitors, retirees and part-time residents, with less than a dozen new “affordable” units added to the city’s housing stock over the last 10 years.

In fact, the number of affordable homes, apartments and condominiums available for rent to (or purchase by) working folks (and families) has declined in recent years, in part due to the growing popularity of short-term “by owner” vacation home rentals pioneered by companies like VRBO and Airbnb. Absentee owners have been taking their properties off the long-term rental market in favor of renting their homes and condos to tourists on a nightly basis during “peak” periods, and letting them go vacant during the off-seasons. This activity is allowed in the city’s “resort residential” and “business” zoning districts, but is also taking place in residential zoning districts where it is an enforcement issue for the City, and a quality of life issue for neighbors.

As in many amenity-rich communities, the cost of living and real estate in Whitefish are high ... especially relative to prevailing wages. This disparity has resulted in the overcrowding of rental units and cost-burdening for local households. With limited affordable housing options, nearly 60-percent of Whitefish workers commute to their jobs from surrounding communities, in some cases travelling more than 50 miles one-way to their work site.

The lack of affordable housing for all sectors of the Whitefish workforce is limiting economic development on every level, and stymies the growth of the community as a whole. Having a critical mass of workers (and their families) that are vested in the community and live here promotes diversity, while also sustaining the sense of uniqueness and the “real town” character that is so valued by Whitefish residents.

In addition, the negative impacts associated with commuting – traffic congestion, worker productivity, transportation costs, time away from family and absenteeism – can be reduced

when workers live near their jobsite. Finally, when housing is affordable, families are better able to cover other important expenses such as health care, education, insurance, transportation, etc. Whitefish would like to ensure that there are affordable housing options for all who would choose to live and work in our community.

In an effort to address these critical issues, the City and Chamber last year conducted a comprehensive Workforce Housing Needs Assessment in an effort to quantify the existing need for housing as well as projected future needs.

The next step in the process is to develop a comprehensive set of tools and strategies, both regulatory and non-regulatory, that will allow the community to deal effectively with the supply and affordability issues documented in the 2016 Housing Needs Assessment.

The Affordable Workforce Housing Plan will:

- Identify tools for a balanced approach to addressing the workforce housing shortage;
- Ensure an adequate supply of affordable workforce housing across a range of options, including: long term rentals; rentals for seasonal workers; and home ownership opportunities within walking or biking distance of downtown;
- Identify what housing types are needed, along with the best places to locate new developments near transportation, businesses and essential services;
- Identify ways to incentivize owners of rental and owner-occupied properties to rehabilitate their existing units and preserve them for either long-term leasing or affordable sale;
- Identify neighborhoods and properties in need of rehabilitation;
- Keep seniors who desire to “age in place” in their homes;
- Address public housing; and
- Include specific tools and strategies to ensure that needed housing actually gets built.

For the purposes of this project, “workforce housing” means housing of a suitable type and at a suitable price (for rent or purchase) to meet the needs of the wide range of occupations that make up the Whitefish workforce. These occupations include workers in the tourism industry (wait staff, kitchen help, janitors, retail clerks, lift operators, hotel workers, etc.), essential service personnel (police officers, firefighters, nurses, teachers, technicians and office staff), as well as business owners, managers and professionals. Workforce housing may also include any underserved markets in which housing may be considered attainable by households earning 120% or more of the area’s median income. Housing is considered to be “affordable” when the monthly rent or mortgage payment is equal to no more than 30% of a household’s gross income.

2. Administrative Information

Contractor Contact

Any questions regarding the Request for Proposal (RFP) requirements should be directed to:

Kevin Gartland – Executive Director
Whitefish Chamber of Commerce
P.O. Box 1120
307 Spokane Avenue; Suite 103
Whitefish, MT 59937

(406) 862-3501
kevin@whitefishchamber.org

Due Dates

All proposals are due by 5 p.m. on Monday, April 3, 2017. Any proposal received after the time and date specified for receipt shall be considered late and non-responsive. Any late proposals will not be evaluated for award.

Process Schedule

March 8, 2017	RFP distribution to contractors
March 17, 2017	Written questions from contractors about scope or approach due
March 20, 2017	Responses to contractor questions distributed
April 3, 2017	Proposal Due Date – Must be received by 5 p.m.
April 19-20, 2017	Candidate interviews/presentations
April 20, 2017	Preferred candidate selection
April 21-28, 2017	Contract negotiation
May 1, 2017	Contract approval & Notice to Proceed
October 16, 2017	Project completion

Section 3 and DBE Requirements

Consistent with the requirements of Section 3 of the Housing and Community Development Act of 1968, CDBG regulations governing the grant require that to the greatest extent feasible, opportunities for training and employment arising in connection with this CDBG-assisted project will be extended to local lower-income residents. Further, to the greatest extent feasible, business concerns located in or substantially owned by residents of the project area will be utilized. Disadvantaged business enterprises are encouraged to apply.

3. Guidelines for Proposal Preparation

Proposal Submission

Award of the contract resulting from this RFP will be based on the most responsive contractor whose proposal will be most advantageous to the City and Chamber in terms of cost, functionality and other factors as specified elsewhere in this RFP.

The City and Chamber reserve the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential contractor;
- Accept other than the lowest priced proposal;
- Award a contract on the basis of initial proposals received, without discussions or requests for “best and final” proposals; and
- Award more than one contract.

Proposals shall be submitted in several segments, as set forth below. Contractors will limit their submissions to those matters sufficient to define their proposal and to provide an adequate basis for the Chamber’s evaluation of the contractor’s proposal.

The Contractor’s proposal submitted in response to this RFP will be incorporated into the final agreement between the City of Whitefish and the selected contractor. Proposals are suggested to include each of the following sections:

- Executive Summary
- Scope, Approach & Methodology
- Project Deliverables & Timing
- Project Management Approach
- Detailed and Itemized Pricing
- Appendix 1: References
- Appendix 2: Project Team Staffing
- Appendix 3: Company Overview

Prospective contractors shall submit six (6) hard copies of their proposal, and a copy of the proposal in digital format.

4. Evaluation Factors for Award

Any award made pursuant to this RFP will be based on the proposal with appropriate consideration given to operational, technical, cost and management requirements. Evaluation of proposals will be based on the contractor's responsiveness to the RFP and the fee structure quoted for all items covered by the RFP.

The following elements will be the primary considerations in evaluating all submitted proposals and in the selection of a contractor:

- Completion of all required responses in the correct format.
- The extent to which contractor's proposal fulfills the Chamber's stated requirements as set out in this RFP.
- Qualifications of proposed professional staff members and their supervisors, and availability for the project;
- The capability of the firm to meet time and project budget requirements;
- The proposed technical approach for completing the scope of work;
- The capability of the firm to complete work, given existing and future workloads;
- The experience of the firm in doing comparable work for other clients;
- The work the firm has performed for the City recently or is performing;
- The location of the firm in relationship to the project.

The City and Chamber may, at their discretion and without explanation to prospective contractors, at any time choose to discontinue this RFP without obligation to such prospective contractors. The City of Whitefish will contract with the successful applicant.

5. Scope of Work and Deliverables

The purpose of this RFP is to select a contractor to lead a broad-based public process aimed at the creation of a comprehensive set of housing development tools, strategies, priorities, policies and implementing actions that will substantially increase affordable workforce housing development in the community, incorporating the recommendations and findings of the 2016 Workforce Housing Needs Assessment.

A detailed scope of work will be negotiated with the successful contractor following the screening/selection process; at a minimum, responses to this RFP should address:

Best Practices – Identify and assess the many programs, practices and strategies employed by similar mountain resort (and other) communities to address the workforce housing issue. Prioritize housing development options based on effectiveness of putting housing on the ground, ability to implement based on local housing market challenges and opportunities, and the degree of public support necessary for successful implementation.

Land – Provide location criteria that the City and Chamber can use to evaluate potential sites for workforce housing development within the study area.

Funding – Identify options for funding land acquisition and/or development.

Regulatory – Identify possible regulatory measures, incentives, and other non-regulatory options, and assess the probable success of each in spurring and/or funding Workforce Housing development. Any regulatory or otherwise mandatory measures recommended should be accompanied by an assessment of their legality under Montana state law. In addition, any regulatory measures (such as linkage requirements) that will exact a specific contribution from a developer or business operator shall be accompanied by data and calculations that establish a clear relationship or nexus between the activity generating the need for workforce housing and the required contribution.

Public Involvement – Whitefish is an extremely active and politically-involved community, and workforce housing is widely regarded as one of the city's most pressing issues. The successful proposal will have a strong public input/involvement/educational component that will result in consensus-based goals, solutions and options that are unique to Whitefish, reflect the community's culture and values, and are allowable under Montana law and/or the City's self-government charter.

Deliverables

The contractor shall provide an outline of its proposed deliverables within its proposal.

At the conclusion of the project, contractor will deliver a complete, comprehensive and unified written and illustrated report setting forth recommendations, strategies, priorities, financing alternatives and both regulatory and non-regulatory actions to address the current and projected affordable workforce housing needs identified in the 2016 Workforce Housing Needs Assessment. The report shall also be provided in electronic medium, along with a PowerPoint presentation that summarizes the analyses, conclusions and recommendations contained in the report.