



Chamber of Commerce

REQUEST FOR QUALIFICATIONS

FOR PROVIDING

Housing Needs Assessment

for

Whitefish, Montana

QUALIFICATIONS ARE DUE NO LATER THAN THE CLOSE OF BUSINESS ON

Monday May 9, 2016

Contact

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Whitefish Chamber of Commerce
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Request for Qualifications

Housing Needs Assessment

The Whitefish Chamber of Commerce, in partnership with the City of Whitefish, the Whitefish Housing Authority and the Whitefish community, is seeking statements of qualifications and interest from qualified professional service firms, teams, and individuals for the preparation of a comprehensive **housing needs assessment** for Whitefish, Montana and surrounding area. The study area is assumed to be within the 59937 zip code. The assessment will identify the community's critical housing needs and provide information that can be used in developing an affordable/workforce housing strategic plan to address those needs over a 10-20 year period.

The issue/problem descriptions provided in this RFQ contain adequate information to enable the preparation and submission of statements of qualifications for consideration. The Whitefish Chamber of Commerce shall be the sole point of contact for this RFQ. The Chamber is not liable for any cost incurred by prospective contractors in the preparation or submission of statements of qualifications pursuant to this RFQ. The Whitefish Chamber is an affirmative action/equal opportunity organization that selects contractors without regard to race, religion, color, ethnicity, gender, age, or disabilities. Prospective contractors understand that the Chamber reserves the right to reject any and all statements of qualifications and to waive any irregularities and technicalities in the submission and/or selection process.

The 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 visitation 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 over 600,000 visitors per 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 BNSF Railway runs through Whitefish with approximately 30-40 freight trains per day. Whitefish is also a major stop for Amtrak's Empire Builder passenger service that provides one east-bound and one west-bound train per day.

The City's "peak tourist season" is mid-June to mid-September, when Glacier National Park is in full operation and local lakes and rivers are busy with boaters, floaters and anglers. The winter ski season runs from early December through early April, and is gaining in popularity. Whitefish Mountain Resort was included in Ski Magazine's "Top-10"

resort destinations in 2015, for the first time ever.

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

As part of its development into a premier recreation and visitation destination, much of the new housing in the Whitefish area is being marketed to visitors and part-time residents. According to 2014 estimates, of the 8,030 total housing units in the 59937 zip code, 31.4% were vacant (margin of error +/- 3.1%). This vacancy rate is indicative of a high rate of seasonal occupancy. That conclusion can be confirmed by looking back at the 2010 Census which shows a 28.8% vacancy rate for all dwelling units in the zip code, and 74.4% of those vacant units were “for seasonal, recreational, or occasional use”.

The growing popularity of “by owner” vacation home rentals has also contributed to the local housing shortage, as absentee owners take their properties off the long-term rental market in favor of renting their homes to tourists on a nightly basis. This activity is mostly taking place in the “resort residential” city zoning districts where it is allowed, but it is also taking place in other residential zoning districts where it is an enforcement issue for the City.

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

The lack of affordable housing for all sectors of the Whitefish workforce limits economic development on every level, and stymies the growth of the community as a whole. Having a critical mass of workers (and their families) who are vested in the community and live here full-time promotes diversity, while also sustaining the “real town” character that is valued by Whitefish residents. In addition, the negative impacts associated with commuting such as 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 education, health care, food, childcare, insurance, etc. Whitefish would like to ensure that there are affordable housing options for all who would choose to live and work in the community.

In order to address these critical issues, the community must first accurately assess and

quantify its current and future housing needs. Then a strategy must be mapped to meet those identified needs, along with effective programs and policies for the community to pursue. These steps help to reach the community goal of making Whitefish accessible and affordable for those who wish to live, work, and play here.

Housing Needs Assessment:

The consultant will conduct a comprehensive Housing Needs Assessment that includes an estimate of the existing need for housing as well as projected future needs. The goal is to identify specifically where and how the housing market is not meeting the current and future needs of its residents and workforce in terms of product, location, and pricing. The future needs analysis should include projections for the next 20 years in 5-year increments. It is anticipated that the selected team or firm will work with a steering committee composed of local citizens and officials, and that a community involvement program and targeted surveying will also be part of the Needs Assessment process.

The Needs Assessment should include a description of the methodology used and rationale behind all assumptions that are used. The Needs Assessment should also describe how the projections take into account the many variables that affect workforce housing demand, supply and affordability, including (but not limited to):

- Population and demographic trends
- Wages and household income
- Jobs and economic forecasts
- Lending practices and interest rates
- Seasonality of jobs
- Local housing market trends
- Local housing stock (price, appreciation, affordability, age, condition)
- Impacts of baby boomers, second home owners, vacation homes and by-owner short term vacation rentals
- Loss of existing employee housing units to redevelopment or other types of housing
- Distribution of jobs and housing throughout the Flathead Valley, and issues of fair share of housing (i.e. over-concentration of income levels, maintaining an equitable mix, etc.)
- Commuting patterns – present and future
- Regulatory analysis and development opportunities

Statements of Qualifications:

Qualification statements should not exceed 15 pages plus resumes for each member of the firm or team to be involved in the project. Three (3) printed copies of each statement are requested plus electronic format. All qualifications statements shall be delivered to the Whitefish Chamber offices by **5:00 PM, Monday May 9, 2016**. In fairness to all teams and firms, statements that do not meet this deadline cannot be accepted. At a minimum, qualifications statements shall contain the following:

1. General descriptions of each firm or individual consultant to be involved in the project, including services provided, key personnel, staffing levels, type of projects undertaken and clients served.
2. Descriptions of the training and experience of each member of the firm or team that qualifies each firm or team member as an expert in their field commensurate with their anticipated role in the project. Include only those individuals who will actually be assigned to this project.
3. A summary of completed projects in the areas of housing needs, affordability assessments, comprehensive housing affordability strategies (CHAS) or similar projects, state consolidated plans or similar projects, and workforce housing studies and assessments. Include client contact information for reference purposes and links to the document or documents produced by each project. Include descriptions of community involvement efforts and methodology for targeted surveying to gather data on housing needs and income for the various occupations that comprise the workforce. For documents not online, a PDF or Word document on a disc or flash drive will suffice. Submission of printed copies of previous work is not encouraged.
4. A general statement of understanding and project approach to the Whitefish Housing Needs Assessment, including a suggested approach to community involvement.
5. Availability to undertake the Whitefish Housing Needs Assessment and the ability to complete the project within a time frame of approximately five months.

Screening and Selection Process:

The Whitefish Chamber of Commerce, the City of Whitefish and other participants will form a 7 to 9 person selection committee consisting of the Executive Director of the Chamber, municipal officials, local housing officials, professionals in the field of community planning and/or housing administration, finance, design, or construction, and interested citizens. The committee will screen and rank the applications according to expertise of the firm or team members, quality of prior project experience and relevance to the Whitefish housing needs assessment project.

The three or four top ranked firms or teams will be invited for an on-site presentation and interview in Whitefish. The final decision of the firm or team selected to negotiate a scope of work and contract will be made by the Whitefish Chamber of Commerce Board of Directors.

Project Budget:

It is anticipated that the project budget for the Housing Needs Assessment will be up to **\$40,000 USD**. The actual amount of the contract for service will be determined by the scope of work and project schedule agreed upon by the local project participants and the firm or team selected. Funding has been secured.

For purposes of this RFQ, workforce housing means housing of a suitable type and at a suitable price (rent or purchase) to meet the needs of the wide range of occupations that make up the Whitefish area workforce. These occupations include seasonal workers in the visitation industry (waiters/waitresses, kitchen help, janitors, retail clerks, lift operators, etc.), essential service personnel (police officers, firemen, nurses, teachers, physician assistants/medical technicians), and professionals such as doctors, managers, administrators, banking and finance, IT, etc. Workforce housing may also include any underserved markets in which housing may be considered attainable by household earning 120% or more of the area median.

A link to an article on housing affordability in the March 2 edition of the Flathead Beacon is provided below:

<http://flatheadbeacon.com/2016/03/02/the-affordability-gap/>

Project Timeline:

- Monday, April 4 – Final RFQ approved by Council
- Friday, April 8 – Issue RFQ
- Friday, April 22 – Deadline for Questions
- Monday, April 25 – Answers Issued
- Monday, May 9 – Submissions Due
- Thursday, May 19 – Candidate interviews/presentations
- May 23-24 – Preferred Candidate Selection
- May 25-June 3 – Contract Negotiation
- Monday, June 6– Contract Approval; Notice to Proceed
- Monday, June 20 – Kickoff meeting with Chamber, Council and Housing Authority
- Tuesday Nov. 1 (or earlier) – Completion

Qualifications must be received by 5 p.m. on Monday May 9, 2016. Submit qualifications to:

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

For questions, contact Kevin Gartland at (406) 862-3501,
or via email at kevin@whitefishchamber.org.