



A Request for Proposals

Workforce Housing Study and Preliminary Architectural Report (PAR)

Issued by:

Red Lodge Area Community Foundation

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**Request for Proposals
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SECTION I: GENERAL INFORMATION

1. SUMMARY

The City of Red Lodge received a federal Community Development Block Grant (CDBG) award in the amount of \$30,000 by the Montana Department of Commerce (MDOC) and has designated the Red Lodge Area Community Foundation (RLACF) as the sub-recipient of funding. In addition, RLACF received an American Rescue Plan Act (ARPA) award in the amount of \$20,000 by Carbon County. These awards are for the completion of a housing study that includes a Preliminary Architectural Report (PAR) by May 2022. The purpose of this project is to increase the supply of affordable housing by providing market and suitability information for affordable housing development projects in and around Red Lodge, MT and other surrounding communities in Carbon County, MT excluding the town of Joliet by request of the County Commissioners, who have a current project located there.

Contingent upon this award, the RLACF is soliciting offerors in response to this Request for Proposals for architectural and planning services to:

- Present and analyze reasonable housing development sites within the Red Lodge city limits, and propose a specific course of action for solving any identified problems
- Present and analyze reasonable alternatives and additional sites outside the Red Lodge city limits, excluding the town of Joliet, and propose a specific course of action for solving any identified problems
- Provide sufficient information to adequately assess the need for both feasibility, and general estimated costs of workforce housing construction in all viable sites identified.
- Incorporate public input for the selection of the preferred architectural design of the workforce housing project, especially representatives or members of any groups that are expected to be the principal residents of the development.
- Increase capacity for a viable project to construct 12-20+ units with at least 51% to be reserved for low to moderate income individuals

All activities must be conducted in compliance with all applicable requirements under the Montana CDBG Program. Payment terms will be negotiated with the selected offeror. The fee for architectural and planning services will be paid with CDBG funds as well as match funds from RLACF. The PAR must be prepared by a professional architect licensed to practice in the State of Montana.

Following pre-design approval, the selected firm may be asked at the discretion of the RLACF and City of Red Lodge to assist in developing a final construction design, coordinating the construction bid process, and overseeing construction activities.

2. INTENT

The Housing Study and PAR will facilitate the sustained livability within Carbon County and the City of Red Lodge by fostering economic development through housing that is available and affordable for the local workforce. Sites that have readily accessible water/sewer lines should be prioritized to maximize public works investments in the community. The Housing Study and PAR will utilize the Red Lodge City's Growth Policy and Zoning Regulations along with the Carbon County Growth Policy to encourage urban density, walkable communities, and an energy efficient housing design. Because affordable housing is necessary for a growing workforce, this study will improve the economic viability of the city and the surrounding community.

The long-term outcome of the proposed planning project will provide crucial site analyses and financial information needed to create capacity for the construction of workforce housing units in high demand by the Red Lodge area community and greater area of Carbon County, and will create resources for private developers to create additional affordable housing units. This future construction project (dependent on available funding) will increase the quality and choices of housing in the Red Lodge area and additional areas of the county, provide the community with awareness of housing issues, maintain the integrity and uniqueness of our small-town culture and strengthen its economic well-being by influencing the housing environment to be more affordable, attractive, stable, and accessible for the local workforce.

3. BACKGROUND AND PROJECT HISTORY

Low availability of stable, affordable housing options negatively impacts local businesses and their workforce. In February, 2021, the Red Lodge Area Community Foundation hosted a virtual Housing Forum with dozens of individuals in attendance representing some of the largest employers in Carbon County. Multiple businesses expressed their inability to re-open since COVID or their inability to grow, due to the lack of local housing units their employees can afford. The shared need by the majority of the community leaders at this forum was for affordable long-term rental units for the local workforce.

The City of Red Lodge has proactively supported affordable housing options, contributing infrastructure installations and waiving permit fees for past economic development projects that benefited the community as a whole. The 2020 Growth Policy guidelines provide direction for achieving goals through the Red Lodge Zoning Regulations, recommending increased lot coverage, density and use allowances within new Planned Unit Developments. In 2019, the City

of Red Lodge passed a resolution to commit HOME funds for affordable housing. These funds are the result of the City of Red Lodge Homebuyer Management Plan developed in 2007.

The current median sale price of a single-family home in Carbon County has increased by over 12% annually over the past 5 years according to preliminary data from the Beartooth RC&D Regional Housing Study. In 2020, the median price of a home in Carbon County was \$391,000—this is over \$100,000 higher than what is affordable for households earning 100% of the Area Median Income. Based on data from our 2016 Housing Needs Assessment, over 40% of renters in the Red Lodge area are spending more on housing than what HUD considers affordable (more than 30% of their income). One in four homes in the City of Red Lodge are owned by second home-owners and used for short-term rentals such as Airbnb and VRBO, and are no longer available to low- and moderate-income households. This trend has been rapidly increasing through the pandemic as the demand for whole house vacation rentals has increased.

SECTION II: SCOPE OF WORK

1. PROJECT SCHEDULE

PROCUREMENT OF PROFESSIONAL ASSISTANCE	
RFP Published	December 2, 2021; December 9
Proposal Submittal Deadline	January 13, 2022
Proposals Reviewed by Committee	January 13 – 20, 2022
Candidates Notified of Selection	On or before January 20, 2022
Agreement executed	January 31, 2022
PROJECT IMPLEMENTATION	
PAR and Housing Study begins	February 2022
Draft deliverables for progress report prepared	April 2022
Submit Progress Report and draft deliverables	On or before May 15, 2022
Public review and comment period	May 2022
Finalize deliverables	June 2022
PROJECT CLOSE OUT	
PAR and Housing Study Finished	On or before June 30, 2022

2. SCOPE OF SERVICES

The project will require the following tasks and are in accordance with PAR guidelines provided by the Montana Department of Commerce’s CDBG program:

- I. **PROBLEM AND NEED DEFINITION** – Describe and document the problem(s) to be solved and need(s) identified.
 - a. **IDENTIFY THE PLANNING AND SERVICE AREA OF HOUSING DEVELOPMENT.** Using narrative and drawings, describe the planning and service area. The description should include the following information:
 - i. **LOCATION** – Indicate legal and natural boundaries, major obstacles, environmental constraints (such as floodplains), etc., using maps, photographs, and sketches of the planning and service area for the housing units.
 - ii. **GROWTH AREAS AND PROJECTED POPULATION TRENDS**
 1. Identify specific areas of projected, concentrated population growth and relate these to the forecasted growth in the clientele to be served by the proposed Housing Development.
 2. Provide population projections for the project’s planning and service area (and for the persons and/or groups that will be housed by

proposed development) for the projected design period (I.e., the anticipated useful life of the proposed housing development).

3. Base projections for the clientele to be served upon historical records, Census data, economic projections, Beartooth RCD's Regional Housing Study, and citing other recognized sources.

b. SUMMARIZE HOUSING NEEDS

- i. Identify affordable housing needs as well as potential solutions to meet those needs. Examples may include housing targeted to long-term renters, seasonal workers, first-time homebuyers, seniors, homeless population, and low- and moderate-income households.

II. FINAL PROPOSAL

a. DESCRIPTION OF SELECTED SITE(S)

- i. **IF PROPOSING REHABILITATION OF EXISTING BUILDINGS** – Describe existing buildings within the selected site that could be modified or rehabilitated to accommodate the proposed facility or structure.

1. Describe the potential benefits and possible deficiencies with the proposed design, building or site, including code compliance issues, floor space, handicapped accessibility, and potential for long-term expansion, as applicable.

- ii. **IF PROPOSING NEW CONSTRUCTION** – if proposing new construction, describe the selected building site for new construction, any existing structures on the sites(s), potential for long-term expansion, proximity to other services, environmental constraints, etc.

- b. **REGULATORY COMPLIANCE AND PERMITS.** Describe issues that must be addressed regarding compliance (for either a new building or a rehabilitated building) with appropriate regulations such as the International Building Code and other relevant codes, zoning, asbestos, lead-based paint, special permits, handicapped accessibility (American Disabilities Act and HUD 504 regulations), designated 100-year floodplains, and any other applicable federal, state, local or tribal requirements.

- c. **LAND ACQUISITION ISSUES.** Identify sites to be purchased or leased and any easements needed, if applicable.

- d. **CONSTRUCTION SITE PROBLEMS OR ISSUES.** Discuss potential concerns such as geological constraints, limited access, underground storage tanks, floodplains, high water table, asbestos, lead-based paint, contaminated soil, noise, odors, or other conditions that may affect cost of construction or long-term operation of the (new or rehabilitated) facility or structure.

e. COST ESTIMATES FOR THE SELECTED SITE

- i. **PROJECT COSTS** administrative, financial, engineering, architecture, and anticipated construction costs and

- ii. **PROJECTED ANNUAL OPERATION AND MAINTENANCE COSTS.** In responding to items 1 and 2 for Housing projects, consult Section C (Financial Analysis, Parts I-VI) of the Uniform Application for Montana Housing Loan, Grant & Tax Credit Programs previously submitted with the NSP application.

- iii. **OPERATIONAL REQUIREMENTS.** Discuss the expertise required to operate the facility or structure and any unique operational requirements or benefits of the proposed NSP activity and project.

- f. **ENVIRONMENTAL CONSIDERATIONS.** For the selected and alternative site(s) for the project, discuss the following:

- i. **POTENTIAL ENVIRONMENTAL IMPACTS** - The information described in the completed Uniform Environmental Checklist (found in the Uniform Application for Montana Housing Loan, Grant & Tax Credit Programs) is the basis for discussing environmental resources in the area that might be impacted or that might impact the proposed facility. The Uniform Environmental Checklist must be attached as part of the PAR. If there has been a previous environmental assessment completed for the project, please include a copy of that assessment in addition to the completed Uniform Environmental Checklist. With the exception of coastal zones and coastal barriers, possible impacts on each environmental issue must be investigated and discussed.
- ii. **MITIGATION** - Evaluate appropriate short and long-term measures to mitigate each potentially adverse impact. Describe the mitigation measure(s) necessary to minimize potentially adverse impacts upon identified environmental resources. Projects contemplating the renovation of existing structures should thoroughly discuss mitigation measures to address any existing hazards, such as asbestos and lead-based paint, where identified, in accordance with federal and state requirements.
- iii. **CORRESPONDENCE** - Include any environmentally-related correspondence and agency comments (e.g., comments from the State Historic Preservation Office) as required by the Uniform Environmental Checklist, found in the Uniform Application for Montana Housing Loan, Grant & Tax Credit Programs.
- iv. **EXHIBITS/MAPS** - Include any exhibits, maps, or drawings as applicable to describe potential environmental impacts.

III. CONCLUSIONS AND RECOMMENDATIONS - Provide any other conclusions and recommendations and any additional findings that should be considered in the evaluation of the proposed project and the selected alternative.

PROPOSAL CONTENT

Response should demonstrate that the firm has the professional capability and availability to satisfactorily and timely complete all the tasks as described in the Scope of Services section of this RFP. Responses should include:

1. The firm's legal name, address, telephone number, principal contact email address, and SAM and DUNS numbers.
2. A statement of the firm's experience and qualifications of the staff to be assigned to project.
3. A resume for each professional staff person who may be assigned to the project, along with relevant information about each individual, including:
 - a. Expected responsibilities on this project;
 - b. An explanation of each person's role and responsibilities on the project;
 - c. Knowledge of and experience with design and construction of community and/or public facilities.

4. A description of the firm's prior relevant experience, including any similar projects (including, but not limited to, those funded by or for a CDBG project), size of community, location, total construction cost, and name and contact information of a local official knowledgeable regarding the firm's performance.
5. The proposed work plan and schedule for activities to be performed within the defined timeline noted on page 6.
6. A detailed cost proposal for all work and services to be completed within the defined project timeline.

SECTION III: RFP EVALUATION AND PROCESS

EVALUATION CRITERIA

Respondents will be evaluated according to the following factors:

Criteria	Maximum Points Possible
Qualifications of firm: Response indicates qualification and experience of the professional personnel to be assigned to the project.	30 points
Capability of firm to meet time and project budget requirements: Response indicates firm has the time and capacity to meet schedule requirements. Response demonstrates ability to design in consideration of and adhere to project budget.	20 points
Physical location of the firm: Response details local professional resources.	10 points
Present and projected workload: Response indicated firm has available resources to complete the project by the desired completion date.	15 points
Related experience on similar projects including development of public buildings; publicly funded projects.	15 points
Responsiveness to the RFP: Response indicates an understanding of the project, timelines, budget, user groups, teamwork, federal funding requirements, and attention to detail.	10 points

The award will be made to the most qualified offer or whose proposal is deemed most advantageous to RLACF with all factors considered. An interview may be conducted by the selection committee prior to the final selection. Selected firm may be used for project design and construction management, dependent on available funding. Unsuccessful offerors will be notified as soon as possible.

PROPOSAL SUBMITTAL

Four copies of the proposal are to be delivered to Red Lodge Area Community Foundation, Attn: Tracy Timmons, 122 S Hauser Ave, PO Box 1871, Red Lodge, MT 59068. **All responses must arrive no later than 5 p.m. on January 13, 2021.** No bids are to be accepted after this time.

Responses should be limited to 10 pages, double-sided, excluding a one-page cover letter and resumes. Minimum font size for all text is 12 point.

This solicitation is being offered in accordance with federal and state statutes governing procurement of professional services. Accordingly, RLACF reserves the right to negotiate an agreement based on fair and reasonable compensation for the scope of work and services proposed, as well as the right to reject any and all responses deemed unqualified, unsatisfactory, or inappropriate. RLACF also reserves the right to request new proposals if needed.

Questions concerning this solicitation may be directed to Robin Adams, Workforce Housing Coordinator at the Red Lodge Area Community Foundation, at robin@rlacf.org or (406) 426-1983.

SECTION IV: INFORMATION FOR CONSULTANTS

SECTION 3 OF THE HOUSING AND URBAN DEVELOPMENT ACT OF 1968.

The Respondent will ensure that to the greatest extent feasible, opportunities for training and employment arising in connection with this CDBG-assisted project will be extended to lower income project area residents. Further, the Contractor will, to the greatest extent feasible, utilize business concerns located in or substantially owned by residents of the project area, in the award of contracts and purchase of services and supplies.

DISADVANTAGED BUSINESS ENTERPRISES (DBEs)

DBEs, a term used to collectively refer to both women-owned business enterprises and minority-owned business enterprises, are invited and encouraged to submit a response to this RFP. RLACF and the City of Red Lodge will take affirmative steps to assure that DBEs are utilized, when possible, as sources of supplies, equipment, construction and professional and other services. Respondents are encouraged to detail how they will utilize qualified DBE firms to the maximum extent possible.

DISCLAIMER

This RFP does not form or constitute a contractual document. RLACF and the City of Red Lodge shall not be liable for any loss, expense, damage or claim arising out of the advice given or not given or statements made or omitted to be made in connection with this RFP. RLACF and the City of Red Lodge also will not be responsible for any expenses which may be incurred in the preparation of this RFP.

A professional services contract will be required of the selected firm and if the contract fails to be negotiated in a timely manner, RLACF reserves the right to contract with another qualified firm.

NON-RESPONSIVE PROPOSALS

Consultants are expected to provide their best and most competitive proposal. Proposals that offer no response or a response “to be determined” to any item will be deemed “non-responsive” and returned to the submitted without being scored.

EXAMINATION OF DOCUMENTS

Before submitting the proposals, the proposer shall:

- (a) Carefully review the terms of this request as well as the attachments;
- (b) Fully inform yourself of the existing conditions and limitations;
- (c) Include with the proposal sufficient information to cover all items required in the specifications and evaluation.

PROPOSAL MODIFICATIONS

In addition to any other information and documentation requested in this RFP, any forms provided herein shall be included in the submitted proposal. Modifications, additions or changes

to the terms and conditions of this request for proposals may be cause for rejection of the proposal. Proposals submitted without required forms may be rejected. No oral, telephone, email, fax or telegraphic proposals or modifications will be considered.

CERTIFICATION OF ALTERATION OR ERASURE

A proposal shall be rejected should it contain any material alteration or erasure, unless, before the proposal is submitted each such alteration or erasure has been initialed in INK by the authorized agent signing the proposal.

SIGNATURE

All proposals shall be typewritten or prepared in ink and must be signed in longhand by the proposer or proposer's agent or designee, with his/her usual signature. A proposal submitted by a partnership must be signed with the partnership name to be followed by the signature and designation of the partner signing. Proposals by corporations must be signed with the legal name of the corporation, followed by the name and signature of an authorized agent or officer of the corporation. Proposals submitted by a proprietorship must be signed by the owner and the name of each person signing shall be typed or printed legibly below the signature.

WITHDRAWAL OF PROPOSALS

Proposers may withdraw their proposal either personally or by written request at any time prior to the due date set for receiving proposals. No proposal may be withdrawn or modified after the due date and time, unless and until the award of the contract is delayed for a period exceeding ninety (90) days.

QUOTE VALID

The proposer must honor their budget / cost proposal for a period of ninety (90) days after the RFP due date.

CERTIFICATION

The proposer certifies that the proposal has been arrived at independently and has been submitted without any collusion designed to limit competition. The proposer further certifies that the materials, products, services and/or goods offered herein meet all requirements of the stated specifications and are equal in quality, value and performance with highest quality, nationally advertised brand and/or trade names.

INSURANCE REQUIREMENTS

The proposer certifies that it/they must maintain in good standing the insurance described in this Section. Prior to rendering any services, the awarded firm must furnish RLACF with proof of insurance in accordance with this section and must certify that it/they can comply with minimum insurance requirements and workers' compensation and employer's liability coverage as required by Montana law, including:

1. Commercial general liability, including contractual and personal injury coverages in the amount of \$1,000,000 per occurrence and \$2,000,000 aggregate per year.
2. Professional liability in the amount of \$1,000,000 per claim.

DISPOSITION OF PROPOSALS

All materials submitted in response to this RFP become the property of RLACF and the City of Red Lodge. One copy of each proposal submitted shall be retained for the official files of each entity and will become public record after award of the Contract. Price proposals submitted, but not reviewed by the Entity, do not become a public record and shall only be retained for official files.