

# Affordable Housing Action and Implementation Plan

## Request for Proposals (RFP)



The Town of Davidson desires to engage a firm or individual to provide an Affordable Housing Action and Implementation Plan.

Davidson, North Carolina  
December 10, 2020

**Due Date:**

5:00 p.m., Monday, January 15, 2021

**Acceptance Location:**

Due to COVID-19, email is acceptable.

Email to the Town Clerk at  
[bshores@townofdavidson.org](mailto:bshores@townofdavidson.org)

## **I. Request Summary**

The Town of Davidson is soliciting proposals to develop a data and context driven Davidson Affordable Housing Action Plan (the "Plan") to serve as an Affordable Housing Action and Implementation Plan for the Town to actively address the economic and social equity impacts to Davidson's affordable housing needs. Davidson is one of the most expensive places to live in the state and it is anticipated that real estate prices and rent will continue to increase in the foreseeable future. The Housing Action Plan should provide comprehensive, and alternative, recommendations for producing new and preserving existing affordable homes, targeted regulatory changes, strategic infrastructure investments, strategic ways to spend the housing (payment in lieu) funds, identifying new funding sources and other tools to increase affordable housing.

## **II. Introduction**

### **A. Community Profile**

The Town of Davidson was incorporated in 1879. It is home to Davidson College and is located in the northernmost part of Mecklenburg County, approximately 20 miles north of downtown Charlotte, NC. The Town is governed by a five-member Board of Commissioners whose members are elected at large and operates under a Council/Manager form of government. The Town is approximately 5.1 square miles with a residential population of approximately 13,000.

### **B. Background**

Town of Davidson Core Value:

*Davidson's historic mix of people in all income levels and ages is fundamental to our community, so Town government will encourage opportunities, services, and infrastructure that allow people of all means to live and work here.*

Town of Davidson 2020-21 Strategic Goal:

*Work together to create a culture of belonging, address our past inequities, provide opportunities for all, treat everyone with respect and dignity and recognize every voice.*

#### *1. Develop an affording housing plan*

Based on the above stated Core Value and Strategic Goal, the Town Board of Commissioners is interested in developing an Affordable Housing and Implementation Action Plan in order to address the problem of housing affordability.

According to City-Data, the estimated median house or condo value in Davidson in 2017 was \$466, 123. This value has increased over three years. Suffice it is to say that the current sales prices of homes far exceed what low-income and moderate-income households can afford.

Rents have also far exceeded what a low to moderate income wage earner can afford. The median gross rent in 2017 was \$1,166. Current rents at one of the apartment complexes in town range from \$1240-\$1830 for a one-bedroom unit and \$1450 - \$2240 for a two- bedroom unit. These rents and home prices make it very difficult to afford to live in Davidson.

Since 1999, affordable housing in Davidson has been produced by the Davidson Housing Coalition through the use of tax credits and other federal and state subsidies and the Town through a mandatory inclusionary zoning program. The IZ mandate has generated 65 owner occupied homes and 8 apartments. The Town has been using funds generated through the IZ program, referred to as payment in lieu funds, to purchase six naturally affordable homes, partner with a developer to produce new units, provide down payment assistance and help with critical repairs to existing homes. It is anticipated that the fund will eventually be depleted as the Town becomes more and more built out.

A previous housing needs assessment was conducted by the UNCC Urban Institute in 2017. The purpose of the study was to review the housing needs of the Town within the context of population, employment trends, rising housing and land values, and community concerns and to provide an assessment of the then current state of affordable housing in Davidson.

### **C. Purpose of Plan**

The purpose of the Davidson Affordable Housing Action Plan shall be to use the information in the UNCC UI report, in addition to current data and identified community concerns, to provide a plan that outlines how to preserve existing and create new affordable rental and home ownership units in the Town. "Affordable rental and home ownership units" is defined as housing for households having incomes less than 80\* percent of the median family income for the Charlotte-Mecklenburg HUD Metropolitan Fair Market Rent Income Area, adjusted for household size as published annually by the U.S. Department of Housing and Urban Development. Preservation and creation of affordable housing shall include but not be limited to programs designed to further housing rehabilitation and/or development opportunities and those that are designed to directly assist homeowners and renters. The goal of the plan is to prioritize a list of housing needs and outline actionable strategies for addressing these needs.

\*(The Davidson Planning Ordinance provides for housing options up to 120% AMI)

## **III. Proposal Information**

### **A. Contacts**

The principal contact with the Town of Davidson will be Eugene Bradley, Housing and Equity Director, 704-940-9653, [ebradley@townofdavidson.org](mailto:ebradley@townofdavidson.org), or a designated representative who will coordinate the assistance to be provided by the Town to the proposer.

## **B. Proposal Schedule**

The Town reserves the right to make changes to the below schedule, but plans to adhere to the implementation of this RFP process as follows:

RFP released	_____, 2020
Deadline for receiving questions	October 12, 2020
Response to questions	October 19, 2020
Proposals due	November 9, 2020
Interviews	November 16, 2020
Consultant selected	November 23, 2020
Consultant contract prepared	November 26, 2020
Funds encumbered and contract approved	December 8, 2020

## **C. Information to be Submitted with Project Proposal**

### **a. Executive Summary**

Provide a brief summary describing the proposer's ability to perform the work, a history of the proposer's background and experience providing services, the qualifications of the proposer's personnel to be assigned to this project, and any information called for by this request for proposal which the proposer deems relevant. This summary should be brief and concise to apprise the reader of the experience and qualifications of the proposer.

### **b. Questionnaire**

Proposer shall provide responses and information to fully satisfy each item in the Questionnaire.

## **D. Scope of Work**

- a. The Town of Davidson intends to obtain the services of a qualified firm or individual to provide the services as outlined below. Best industry practices and/or best management practices may require additional services not explicitly enumerated. The proposer should identify any additional services required, price them, and explain their response. The proposer will work with the Town's affordable housing director, the affordable housing steering/vision committee and the public throughout the plan process.

- b. Project requirements shall include, but not be limited to :
  - i. Review of all materials in the reference section below.
  - ii. Preparation of an update to the 2017 UNCC ULI report concerning the current state of affordable housing in Davidson.
  - iii. Preparation of an Implementation and Action Plan that identifies housing needs and outlines the next steps to address those needs. *The plan should recommend how to spend the payment in lieu funds, identify other funding sources such as housing bonds, grants, subsidies, etc., and should provide multiple prioritization and implementation options based upon various levels/sources of funding.*
  - iv. Recognition of the housing strategies and programs provided by the non-profit partners in the community in order to maximize overall outcomes from an affordable housing perspective.
  - v. Preparation and implementation of a community engagement program to create the plan using significant community input consisting of two community meetings with residents, two steering/vision subcommittee meetings, one town board meeting, and weekly telephone meetings with staff during the contact period.

## **E. Questionnaire**

- a. Company and General Information
  - i. Company name and address
  - ii. Letter of transmittal signed by an individual authorized to bind the proposer, stating that the proposer has read and will comply with all terms and conditions of the RFP.
  - iii. General information about the primary contact who would be able to answer questions about the proposal. Include name, title, phone number and email.
- b. Qualifications and Experience
  - i. What is your firm's experience conducting the services requested? Describe comparable projects performed by your firm in the last five years, including the number of projects, scope of service and status of project.
  - ii. Describe the qualifications of staff proposed for the assignment. Be sure to include any municipalities they have worked with in the past three years.
  - iii. Identify and provide the resume of the personnel who will be assigned to this project including outreach efforts.

## **F. Miscellaneous Project Requirements**

a. ADA Compliance

The Town of Davidson will comply with the ADA which prohibits discrimination on the basis of a disability. Davidson will make reasonable accommodations in all programs to enable participation by an individual with a disability who meets essential eligibility requirements. Davidson programs will be available in the most integrated setting for each individual. If any accommodations are necessary for participation in any program or services, participants are encouraged to notify Town staff.

b. Minority/Women Business Enterprise

It is the policy of the Town to provide minorities and women equal opportunity for participating in all aspects of the Town's contracting and procurement programs, including but not limited to employment, construction development projects, and materials/services, consistent with the laws of the State of North Carolina. The policy of the Town of Davidson prohibits discrimination against any person or business in pursuit of these opportunities on the basis of race, color, national origin, religion, sex, age, disability, or veteran's status. It is further the policy of the Town of Davidson to conduct its contracting and procurement programs so as to prevent such discrimination and to resolve any and all claims of such discrimination.

c. Insurance and Indemnity Requirements

To the extent permitted by law the consultant shall indemnify and save harmless the Town, its officers, agents and employees and assigns from and against all loss, damages, expenses and liabilities, damage or destruction to property, real or personal; arising from the negligent acts, errors, or omissions of the consultant, its officers, employees, agents and assigns in the performance of professional services under this contract.

The consultant further agrees to purchase and maintain during the life of this contract with an insurance company acceptable to the Town of Davidson and authorized to do business in the State of North Carolina the following insurance:

Automobile: Bodily injury and property damage liability covering all owned, non-owned, and hired automobiles for limits of not less than \$1,000,000 each person/\$1,000,000 each occurrence.

Comprehensive General Liability: Bodily injury and property damage liability insurance as shall protect the consultant from claim of bodily injury or property damage which arises from operations of this contract. The amounts of such insurance shall not be less than \$1,000,000 bodily injury and property damage liability each occurrence/aggregate. This

insurance shall include coverage for product/completed operations and contractual liability assumed under the indemnity provision of this contract.

Consultant's Professional Liability: In a limit of not less than \$1,000,000.

Workers' Compensation and Occupational Disease Insurance:

Coverage A - Worker's Compensation: Meeting the statutory requirements of the State of North Carolina.

Coverage B - Employer's Liability: \$100,000 each accident / \$100,000 disease - each employee / \$500,000 disease - policy limits.

Certificates of such insurance will be furnished to the Town of Davidson and shall contain the provision that the Town be given thirty days written notice of any intent to amend or terminate by either the consultant or the insuring company.

d. Standard Professional Services Agreement

The Town will require the successful company or individual to execute a professional services agreement with the Town. Please review the attached draft agreement and identify any questions, changes or area of concern in your proposal to the town. Any and all requests for changes to the agreement must be included with the responsive proposal.

Attachments:

UNCC ULI Affordable Housing Study

Affordable Housing Strategy Report

Draft Standard Professional Services Agreement