

Teton County/Town of Jackson Housing Nexus Study and Needs Assessment RFQ

Interview Questions

WSW

- Can you please provide a more detailed summary of the proposed budget including the number of hours per staff and billable rate, hours anticipated by task, optional/additional tasks not included, etc. prior to your interview.
1. How do you plan to incorporate and evaluate the data and recommendations of the Nexus Study and Needs Assessment components into each other?
 2. How do you plan to manage and get value out of all the proposed Team members? Is OPS on your team?
 3. Does your team have experience and had success completing surveying in a similar sized community? What is your goal for survey # respondents for each? If a statistically valid response is not received how would you plan to move forward? How do you plan on ensuring a diverse spectrum (wealth, ethnicity, tenure, etc.) of the community is included in the survey responses?
 4. What other housing mitigation tools have you proposed or seen utilized to address housing affordability other than those used locally?
 5. How do you suggest this work (Nexus Study and Needs Assessment) could be communicated, quantified, and understood by the greater community?
 6. Jackson has traditionally been a seasonal, two season economy (summer/winter) with substantial seasonal workers and housing needs, will you include analysis/forecasting that evaluates whether there may be an increase in year-round employment and how this could impact future housing needs?
 7. How do you plan to identify and reach non brick and mortar business? Reliance on the proposed household surveys? In other communities how much of a factor do these have on the big picture (either tourism related or other business segment)? Have you worked on a study that included researching and including non-brick and mortar businesses? If so, what was the outcome, what tools were proposed and/or utilized?
 8. Do you plan to include the regional approach, “housing gaps by income” analysis and sub regional groups as developed in the Roaring Fork work included in your proposal?
 9. Which team members would be responsible for meetings with stakeholder committee – how many meetings, who facilitates who prepares materials?
 10. How do you plan to approach Spanish speaking and Latinx outreach? What strategies have you utilized to ensure this outreach was successful in the past. Who will be responsible to complete this work? Consultants or interpreters?

WSW**Regional Housing Needs Assessment**

	Budget range		Hours	
	Low	High	Low	High
Primary Research				
Employer survey	\$8,500	\$9,500	45	50
Household/employee survey	\$20,000	\$20,000	105	105
Realtor/Lender, Property Manager focus group/interviews	\$4,500	\$5,000	25	25
Key informant interviews	\$4,500	\$5,500	25	30
Regional Housing Needs Assessment and Gaps	\$24,000	\$35,500	125	185
Housing Program, Resources, Opportunities, Constraints*	-	\$11,000	0	55
Conclusions and Recommendations	4,500	5,500	25	30
Meetings, Presentation, Management				
Kick-Off Work Session (zoom meeting)	\$2,500	\$2,500	15	15
Draft report discussion (conference call)	\$2,500	\$2,500	15	15
Joint Policy and Implementation session	\$4,500	\$6,000	25	30
Final Presentation (prep, travel plus meeting) - 2 consultants pr	\$4,500	\$4,500	25	25
Contract/Project Management	\$5,000	\$6,500	25	35
<u>Local assistance contingency (outreach, data resources) - bi</u>	<u>\$5,000</u>	<u>\$6,000</u>	<u>25</u>	<u>30</u>
Total	\$90,000	\$120,000	480	630

*Section proposed by consultant (see p. 22)

	Bill rates	% hours spent
Wendy Sullivan (WSW)	\$250	30%
Christine Walker (Navigate)	\$200	15%
Willa Williford (Williford)	\$200	15%
<u>Andrew Coburn (Urban Rural Continuum)</u>	<u>\$145</u>	<u>40%</u>
Weighted Average	\$193	100%

Difference between the low and high range relate to:

- Housing program, resources, opportunities and constraints analysis - this includes existing housing programs and development environment analysis (p. 22)
- Current zoning capacity - more clarification is needed on the detail and goal of this information; we expect there may be more efficient ways to achieve the information desired (p. 22)
- Regional detail - the extent to which information on each county and jurisdictions are needed (p. 23)

WSW**Housing Nexus Study**

	Budget range		Hours	
	Low	High	Low	High
Task 1: Project Initiation	\$10,000	\$10,000	50	50
Task 2: Residential Nexus Study	\$30,000	\$35,000	145	170
Task 3: Commercial Linkage Fee Nexus Analysis	\$30,000	\$35,000	145	170
Task 4: Fee Level Recommendations and Presentations	<u>\$10,000</u>	<u>\$15,000</u>	<u>50</u>	<u>75</u>
TOTAL	\$80,000	\$95,000	390	465

EPS

	Bill rates	% hours spent
Ashleigh Kanat	\$275	30%
Brian Duffany	\$215	10%
Snow Zhu	\$175	40%
<u>Rachel Shindman</u>	<u>\$155</u>	<u>20%</u>
Weighted Average	\$205	100%

Difference between the low and high range relate to:

Inclusion of the optional Housing Fee Feasibility Analysis (p. 26)

Inclusion of expanded non-brick-and-mortar analysis (e.g. visitor impact linkage, etc.) (pp. 23-4)

WSW Questions

1. How do you plan to incorporate and evaluate the data and recommendations of the Nexus Study and Needs Assessment components into each other?

The two studies will not be combined. They serve distinct purposes and will be kept separate.

We have, however, proposed a strategy session that will focus on how these studies can and should be used together to develop a robust and balanced housing program that targets the full spectrum of needs. This session will create the “bridge” between these two studies.

The Needs Assessment will identify how much housing and at which price points are needed to address current housing deficiencies and meet future needs of residents and local employees. This study provides the data, information, and “story” to support and prioritize various housing strategies in the region.

The Nexus Study will provide the basis for updating impact fee amounts and application in Jackson/Teton County.

The Nexus Study focuses on one housing strategy; recommendations from the Needs Assessment will incorporate a range of strategies, including impact fees, that can work together to address the full range of housing needs. Just as the Needs Assessment will help the Town/County prioritize how best to spend impact fee revenue in the coming years, it will also help the Town/County understand what component of the housing need that impact fees can fill and where other programs are needed to address the full spectrum. The strategy session will draw this connection, and lead to more targeted next step recommendations that will contribute to a robust housing program.

2. How do you plan to manage and get value out of all the proposed Team members? Is OPS on your team?

At the interview, each of our team members will introduce themselves and their primary role/expertise they bring to the task – every member has unique and complimentary skill sets that will bring value to the process. We have assembled a team of professionals with broad experience that will allow us to bring the most cost-effective and efficient resources to each task. Our teaming/staffing will allow us to proceed with both the Needs Assessment and Nexus Study concurrently, allowing for a more efficient study process.

Our combined team will bring forth a well-rounded approach and recommendations that blends our range of experience to bring lessons learned and best practices from our robust array of communities and locations, paired with local expertise. Given the area's long history with addressing workforce housing needs and diversity of programs in place, we have designed a team that will bring value and additional knowledge to your existing expertise and help you move forward.

While OPS Strategies is not a member of our team, we have included some budget in a contingency fund for local survey outreach and other support. OPS has expressed interest in being available as another local resource to our team, if needed, and if we are selected.

- 3. Does your team have experience and had success completing surveying in a similar sized community? What is your goal for survey # respondents for each? If a statistically valid response is not received how would you plan to move forward? How do you plan on ensuring a diverse spectrum (wealth, ethnicity, tenure, etc.) of the community is included in the survey responses?**

The short answer is yes. We conducted a household and employee survey for the 2014 Western Greater Yellowstone Regional Housing Needs Assessment, in which we had great success utilizing trusted local members of the community and organizations to reach out to hard to reach populations in particular. Aside from that, we have conducted similar surveys for the majority of our projects over the past 20 years and, for example, had one-in-four employees that work in Big Sky respond to our survey in 2017. Diligence and incentives (e.g. \$100 gift cards) definitely help, but robust local assistance is the primary key, which is why having stakeholder committee assistance is paramount.

In terms of number of responses, 900 households or more will ensure a minimum 3% margin of error at the 95% confidence level. We received over 1,200 responses in Teton County alone in 2014.

- 4. What other housing mitigation tools have you proposed or seen utilized to address housing affordability other than those used locally?**

Jackson/Teton County has implemented many 'best practice' strategies at one time or another; however, there are always creative approaches being developed that may not necessarily be "new," but rather new ways to approach or apply existing programs. While we recognize that some options may be limited in the region due to existing state legislation, current common considerations include: fees/charges on overnight stays (hotels and short-term rentals), transient occupancy tax, employee head tax on employers, lift ticket taxes, property transfer tax allocations, use of development agreements, annexation agreements, pairing mandates with incentives, pre-approved ADU designs, bringing existing homes into the workforce housing pool, among others.

The most successful housing programs are diverse, resilient and inclusive. This means that they includes a diverse array of strategies to target varying community needs; they include components that work in varying economic and market conditions (e.g. recessions and downturns, as well as boom times); and they include various community members in program implementation (e.g., employers, institutions, organizations, etc.), recognizing that it takes a community to build a community.

- 5. How do you suggest this work (Nexus Study and Needs Assessment) could be communicated, quantified, and understood by the greater community?**

Clear communication of the Needs Assessment results will lend context to the community-wide discussion about impact fees. For the Nexus Study, our approach relies on publicly available, transparent data that is accessible. In our technical work and in our

written reports and presentations, we develop a narrative that allows the public to follow the nexus logic. The “story” component is an important tool for communicating with the public.

6. Jackson has traditionally been a seasonal, two season economy (summer/winter) with substantial seasonal workers and housing needs, will you include analysis/forecasting that evaluates whether there may be an increase in year-round employment and how this could impact future housing needs?

Jackson, like many other mountain resort communities, has become less seasonal over the years. It should be recognized, however, that workers needing housing in the area year-round may hold a year-round job or seasonal jobs or both. Our surveys will help estimate the proportion of seasonal employees that live in the area year round.

Further, the methodology utilized in the Needs Assessment addresses this issue. Job projections are based on year-round average jobs and housing need estimates are geared toward year-round resident and worker needs, which will include year-round job holders and dual seasonal workers, for example. Separate estimates of seasonal jobs will be provided.

7. How do you plan to identify and reach non brick and mortar business? Reliance on the proposed household surveys? In other communities how much of a factor do these have on the big picture (either tourism related or other business segment)? Have you worked on a study that included researching and including non-brick and mortar businesses? If so, what was the outcome, what tools were proposed and/or utilized?

While we responded to part of this question in the RFQ on pp. 23-4, including a couple of tool options, it would help us to better understand your purpose and goal with respect to focusing on non brick and mortar businesses. Understanding the motivation will better help us target our research to meet your needs, and invite a creative discussion around methods to do so.

That being said, a commercial linkage fee on non brick and mortar businesses is not appropriate as there is no new, physical development on which to charge the fee – there is no nexus. However, we *will* be addressing the impacts on non brick and mortar employment and the associated demand for housing through the residential impact fee (i.e., new household expenditures on non-brick and mortar goods and services). As presented in the RFQ (p. 24), we would also like to discuss with you the possibility of linking tourism spending to job generation, which affect many non brick and mortar businesses, and could potentially generate support for more fees on tourism, for example, to address their impacts.

Several paths forward exist – better understanding your needs will help define the right one.

8. Do you plan to include the regional approach, “housing gaps by income” analysis and sub regional groups as developed in the Roaring Fork work included in your proposal?

Yes, we will be identifying housing gaps by income, but in addition to that presented in the Roaring Fork study, WSW typically also breaks out needs by ownership and rental components. We did not specifically identify the breakout areas for your region in the RFQ because we need your input to determine the most appropriate level of detail. If chosen, we anticipate working with the stakeholder committee to refine the scope and discuss your needs to identify the breakouts that will be helpful.

9. Which team members would be responsible for meetings with stakeholder committee – how many meetings, who facilitates who prepares materials?

Wendy Sullivan, as project manager for the Needs Assessment, and Ashleigh Kanat, as project manager for the Nexus Study, will have primary responsibility for meeting with the stakeholder committee. As stated on page 19 of our RFQ response, we will identify early in the process the core stakeholder group that needs to be involved for each study and outline respective roles, tasks and needs.

Because our response was solicited as a Request for Qualifications as opposed to a Request for Proposal, we have identified in our timeline spending the first few weeks of the study refining our proposal and scope of work with the stakeholder committee. We expect to finalize the exact number of meetings and their purpose at that time. We have, however, currently identified a minimum of five to six meetings total. This is outlined on page 27 of our response (“Recruiting technical stakeholder members”) and meetings are illustrated in the timelines on pages 29 and 30.

10. How do you plan to approach Spanish speaking and Latinx outreach? What strategies have you utilized to ensure this outreach was successful in the past. Who will be responsible to complete this work? Consultants or interpreters?

The most successful approach by far is to use locally trusted organizations, individuals, and interpreters familiar with the local dialect. Outside consultants, outside interpreters, and unknown entities are not effective. Please review page 14 of our response to the RFQ for more detail (“Housing Needs Assessment Challenges” and “Multi-Lingual, Multi-Cultural Community Engagement”). Please also review pages 27-28 “Town/County Staff Support” and page 21 “Household/Employee survey” for desired outreach. While our local consultant, Christine Walker, has significant contacts to conduct outreach in the Jackson/Teton County community, it is essential that we have helpful and engaged representation on the stakeholder committee to provide the connections and help generate needed response throughout the region.