Sample Scope of Services for Housing Needs Assessment

The City of Alamosa is requesting pricing options for two scenarios:

- **OPTION A:** Scope of Work for only the City of Alamosa as requested below.
- **OPTION B:** Scope of Work for the City of Alamosa as requested below, and include the County of Alamosa as a separate add-on. Priorities for the county should include an inventory of existing housing stock and vacant lots, an assessment of the development potential of existing rural subdivisions, identification of parcels for future development, and recommendations for the county to reduce sprawl, lessen the impact on groundwater resources, and encourage infill in and around the City of Alamosa.

The following scope of service is intended to address the major aspects believed to be critical for a successful housing needs assessment. However, the City will rely on the successful consultant’s expertise and is amenable to suggested revisions to the scope of work. Bold items indicate items of particular interest.

**Task I: Background Analysis, Inventory and Evaluation of Existing Conditions**

An inventory of existing conditions in the city of Alamosa and a review and summary of pertinent background information will be completed by consultant.

A. **Review Existing Plans and Documents, including:**
   - City of Alamosa Comprehensive Plan
   - City of Alamosa Downtown Design Plan
   - Uniform Development Code
   - 2009 San Luis Valley Needs Assessment

B. **Demographic and Census Data:**
   - Population Trends and Forecasts
   - A breakdown of renters and owners earning <50% of the AMI (low income), 50% to 80% of the AMI (moderate income), 81% to 120% of AMI (middle income) and 120% - 200% of AMI.

C. **Economic Factors to include:**
   - Wages and Household Income
   - Jobs and Employment Forecasts
   - Seasonality of Jobs
   - Lending Practices and Interest Rates

D. **Housing Factors to include:**
   - Local Housing Stock both for-sale and rental (Price, Appreciation, Affordability, Age, Condition)
Housing Programs that are currently being utilized and any gaps that may occur (Self Help Housing, rental assistance, Low Income Housing Tax Credits, USDA 514/516 Farm Labor, USDA 515 Rental Housing, etc.)

- Anticipated loss of current Affordable/Section 8 Housing over the next 5, 10, and 20 years
- Anticipated loss of workforce housing over the next 5, 10, and 20 years
- An estimate of the number of households burdened by high housing costs, including those who are burdened and earn very low, low, moderate and middle incomes

- Housing Needs for:
  - Workforce not currently being supplied by market
  - Very low income/special populations (e.g. persons with fixed incomes)
  - Senior population, including assisted living, life-care, retirees, age-in-place, etc.
  - Persons with disabilities
  - Veterans
  - Migrant workforce
  - Individuals needing transitional/supportive housing (exiting justice system, foster care, homeless, etc.)

- Quantifiable number of units needed of both rental and ownership housing stock to fill unmet needs, by bedroom size and price point
- Mobile Home Parks and the anticipated need for modular units
- Seasonality of college students and faculty
- Seasonality of tourists and retirees
- Effect of vacant and/or dilapidated housing on the housing market

**Task I Deliverable:** Data report summarizing findings in an Excel and/or Word format.

**Task II: Public Participation and Outreach**

This task will initiate the involvement of the Housing Steering Committee, the City Council, Planning Commission and other agencies to ensure their participation in the preparation and implementation of the Plan. Select members of the development community, business leaders and neighborhood trustees should also be included in the public participation activities. This study must include the following outreach and public participation activities:

A. **Key Stakeholder Discussions:** The Consultant will interview up to twenty key stakeholders to help identify the issues facing the City of Alamosa and its housing needs. Stakeholders may include local lending institutions, developers, affordable housing representatives, government and non-government organizations.

B. **Citizen Survey(if needed):** A community survey could be distributed during each of the public engagement activities, posted on the City's website and copies will be provided to be distributed to residents and business owners throughout the project area. The intent of the survey could be to generate additional ideas and concerns individuals may not feel comfortable discussing in a public forum.
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Contract and Scope of Work for Professional Services

Task III: Organizational Strategy Evaluations and Research

This task is intended to guide the City of Alamosa in finding solutions to address the results of Tasks I & II. This task should address at a minimum:

A. What options are available to address the housing needs in the study area
B. What the regulatory barriers are to production of affordable housing opportunities
C. What administrative, land use, and zoning policies should be changed
D. What are the potential solutions for policy makers, non-profit organizations and the private sector (including residents, potential residents and developers) to consider to address identified housing needs and problems
E. How opportunity zones or land banking might play a role in these strategies

Task III Deliverable: Memorandum summarizing the evaluation of the presented strategies.

Task IV: Implementation Strategies

Consultant will advise the City on ways to implement strategies evaluated in Task III. This task should include:

A. Suggestions of strategies for the creation and implementation of housing programs and development of properties to meet the gaps identified in the study
B. Identification of potential revenue funding sources for operational subsidies for housing programs and revenue stream for the production of units to meet area's unmet housing needs. This does not include modeling or strategic evaluation of these potential sources.
C. Identification of potential revenue and legal sources for leveraging local governmental influence of accessible, retirement, tourist, and second-home housing.

Task IV Deliverable: Options for implementing the goals and objectives of the plan will be identified in a written report. Options will include financing, physical improvements, regulatory and other relevant implementation tools and actions that the Consultant will recommend, in addition to land use policies, overlay district options, future land use projections and zoning changes to implement the preferred alternatives. The recommendations will be presented in both narrative and graphic means and will focus on establishing sound policy that will guide all future development decisions.

Task V: Formulation of the Final Assessment

The final product, the City of Alamosa Housing Needs Assessment, will be the synthesis of efforts and research into providing the City with a workable, sound document, fine tuned to the City’s needs and abilities to implement those needs. The first draft and an Executive Summary will be distributed for review by the Planning and Zoning Commission. All suggested revisions and alterations will be completed and presented in the final Plan.

The consultant will present a draft and final Needs Assessment at public meetings. Based upon feedback and direction from the steering committee, the consultant will modify the draft and complete the final Housing Needs Assessment.
The final product will be an electronic product in a searchable pdf and a word format and provided to the specified contact of the City of Alamosa. The Housing Needs Assessment should be suitable for distribution among the citizens and business community. The consultant will present the final Housing Needs Assessment at a public meeting.

Additional Items of Interest

NOTE: All data collected and reports and documents created will be made available to the public. The City will facilitate the disbursement of information; however the consultant will be required to provide any and all documents, data and reports, as requested.

Housing Steering Committee Members
Heather Brooks, City of Alamosa City Manager
Deacon Aspinwall, City of Alamosa Planning
Callie Adams, La Puente
Dawn Melgares, SLV Housing Coalition
Lisa Lucero, Realtor
Robin Wolff, CRHDC
Rachel Baird, Alamosa County, Planning and Building Director
Delzia Worley, Banking
Ty Coleman, City of Alamosa Mayor
City of Alamosa Planning Commission Member