



**Request for Proposals (RFP)
for
Pennsylvania Housing Studies
2019**

Background and Overview

The Pennsylvania Housing Finance Agency ("PHFA" or the "Agency") was established in 1972. PHFA is an agency of the Commonwealth of Pennsylvania existing and operating under state law for the purpose of providing affordable housing and fostering community and economic development in order to make the Commonwealth a better place to live. Among its programs, PHFA provides capital for decent, safe, and affordable homes and apartments for older adults, persons of modest means and those persons with special housing needs. Additional information about PHFA's programs is available on its website at www.phfa.org.

To best achieve its goals and to carry out its fundamental mission in the most effective ways, PHFA from time to time conducts studies and analysis of the Commonwealth's housing markets, housing stock, demographic/community trends and special housing needs. PHFA is desirous of engaging one or more entities to perform these analyses in the coming months. As set forth below, PHFA is inviting qualified entities to submit proposals outlining their ability, methodology, budget, personnel and timelines to perform the housing studies described below.

The primary goal of this solicitation is to secure robust but succinct proposals for the performance and delivery of a comprehensive analysis of affordable housing in the Commonwealth.

An additional goal in this solicitation is to solicit other proposals that offer to provide specialized analyses of various select topics affecting affordable housing, selected consumer populations, targeted trends and markets. Upon receipt and review of proposals outlining areas of study, methodologies, budgets, personnel and timelines, PHFA may determine to fund one or more of the proposals.

Scope of Services

Part I- Comprehensive Housing Study

The Agency is looking for an organization to perform what can best be defined as a comprehensive statewide housing and community study. The study will include an in-depth review of current data and provide detailed information/projections/analytics about housing affordability throughout the state. Additionally the work will provide information about the Commonwealth's housing stock, and identify market, transportation, workforce, socio-economic, climate, technology and population trends over the next decade. The study will ultimately be used to help inform both public and private housing providers, projects, communities and funding sources in their design of programs and priorities.

Please provide a proposal outlining your qualifications, your approach/methodology, timeline, personnel and estimated budget for this comprehensive study. Outline your proposal details specifically, including what data sources and methodology of analysis you will use, what resources you will employ (including staff to be engaged) and expected delivery date for a written report (or reports) and what additional presentations (Powerpoint slides, video, etc.) you will include in your proposal. **PHFA expects the complete Comprehensive Housing Study to be completed within nine months and that materials delivered will be the property of the Agency and made available for publication to the general public.**

After the Agency receives proposals, we will meet with the selected entity/ies to develop and finalize the scope for the Comprehensive Housing Study and the timeline. After these components are determined, final budgets will be finalized as well. All work will be done in accordance with a contract for services in form set forth by the Agency.

Part II - Specialized Areas of Housing Study

In addition to the Comprehensive Housing Study outlined above, the Agency is also considering the possibility of funding studies of several subtopics, either within the Comprehensive Housing Study or through a separate study with selected entity/ies.

Subtopics for possible research are:

1. The Commonwealth continues to have diverse areas of population loss and change in demographics. Plot out the projections and provide analysis of how these trends shape the needs for funding reinvestment in existing housing or new construction in particular types of housing stock (first time homes, tiny houses, congregate living and supportive housing, affordable apartments and shared living arrangements, workforce, energy efficiency enhancements, modular housing or other forms of housing production).
2. There has been active housing development in certain communities in the Commonwealth. How has the development of new affordable housing affected the overall housing market, how has the development changed the value of housing nearby; how have the communities changed economically? Identify specific changes in housing supply, demand, cost and provide relevant information on spillover impact from concentrated development (gentrification).
3. What models for supportive housing for persons with disabilities work and in what locations? Present outcome based best practices. What funding models work best in rural, urban, small urban communities (define each of these areas in your proposal) and what are the factors that support these housing programs (For instance, participation of nonprofits, health care/supportive housing providers, minimum /maximum number of residents; funding models?)
4. What programs for frail elderly work and where are these programs most successful? What are the factors that contribute to these successful models?
5. The optional housing trust fund funded by a portion of the recording tax at the local level has been available at the county level for years. Provide an analysis of what programs have been successful and what the effect and impact of these local programs has been. (Act 137 County-based Housing Trust Fund.)

6. Measure the disparity in homeownership rates for minority populations. Provide an analysis of the disparity in homeownership funding and opportunities for minority populations. Provide an analysis of how the opportunities vary in urban, rural and small suburban communities throughout the Commonwealth.
7. It is posited that affordable housing needs are different in rural, urban and small suburban environments (provide a definition of these terms). Measure and develop metrics to explore this hypothesis and provide guidance for state and local funding programs. Assess the impact of various forms of zoning – Single family, Multi family, Mixed-Use and other relevant zoning classifications. Analyze the spatial disparities involving various forms of transportation and access to technology.
8. There has been funding through the Agency's housing trust fund (PHARE) program for the past few years. What needs are being addressed? What are some best practices/success stories? Are there specific targeted efforts that should be addressed with funding through this program?
9. Lead paint is still present in some portion of the housing stock in Pennsylvania. Provide a study of the extent of lead paint occurrence in housing stock in the state. Identify local programs addressing this housing stock.
10. Lead piping is cited as a problem in the connections between public water supply and private hookups in some communities in Pennsylvania. Provide a study of the extent of lead piping in the private hookups in the state? Where is this a prevalent concern? Identify local, state and federal programs addressing these issues.
11. Wages rates are sometimes cited as an impediment to use of federal and state funding sources in several communities of the Commonwealth. Provide an analysis of the differences between private labor market rates, state prevailing wage rates and Davis Bacon wage rates in several sample labor markets in the state. (Provide a rationale for these locations in your proposal.)
12. After several years of decline, there has been a report in an increase in the level of homelessness. What is fueling this trend? What populations and what geographic areas are most at risk and why?
13. What are the financing challenges and opportunities for manufactured housing in the Commonwealth?
14. Provide an analysis of the impact of transportation in various forms on supply/demand in housing markets.
15. Provide an analysis of zoning on housing supply/demand.
16. Provide an analysis of how broadband access impacts housing.
17. Provide an analysis on how changing weather patterns may impact housing, which markets will be impacted, and how and why. How will affordable housing in and around flood plains, flood ways and flood-prone areas be affected?
18. We are also willing to entertain other well thought-out study ideas that may provide insight into the needs and supply of affordable housing and specific communities in the Commonwealth. If you have a specific idea not covered in one of the previously enumerated areas, please outline it, explain why it is important, how you will approach your analysis following all of the requisite components of the Proposal - procedure and requirement section set forth below.

For any of the above topics, PHFA invites qualified research entities to submit a thoughtful description of the exact topic being proposed for study as outlined in the Proposal-

Procedures and Requirements section below. Upon receipt and consideration, PHFA may interview partners to identify methodologies and select from among the submitted topics for a comprehensive analysis of one or more of these topics.

Please note, PHFA does not expect to fund all of the above topics in the 2019 calendar year. PHFA may select one or more entities depending on the nature of the proposal, the timeline for delivery and the budget. PHFA may determine to not fund any of the topics above.

PROPOSAL

Procedures and Requirements

Questions regarding this RFP may be submitted, **in writing only**, to Bryce Maretzki at the address contained herein. Answers to questions received may be posted at the Agency's website with the RFP, and all potential responders should review the website for additional and supplemental information pertaining to this RFP.

Potential responders must provide all required information set forth below.

A.. Comprehensive Housing Study Proposals:

If you are proposing to provide services to conduct the Comprehensive Housing Study as set forth in Part 1, you must:

1. Provide a Narrative (maximum of five single –space pages)

Proposals should include a written narrative. **This is the core of your proposal** and should provide a clear and concise narrative description of how you propose to perform the study, including datasets, methodologies and scope and approach. Be very concise in outlining your qualifications and how you would approach the study. Provide both a timeline and a budget for the study. The Agency will be reviewing all proposals to determine the entity's familiarity with academic research standards as well as understanding of the Commonwealth's markets, demographics and affordable housing.

2. Attach to the narrative, on separate pages:

- A proposed timeline for the study
- Outline staffing for the study and provide resumes (or CV) of the principal investigator and other key personnel.
(Any academic research groups affiliated with larger institutions must outline their relationships; all study material will become the sole property of the Agency.)
- Provide two professional references for work done of similar scope and timeframe
- Provide budget and cost considerations for the study
- Provide links to two sample research papers/ studies completed within the past five years.

B. Specialized Areas of Housing Study

If you are proposing to provide services to conduct one or more of the Specialized Housing Study topics listed in Part II above, you must:

1. Provide a Narrative (maximum of two single –space pages)

Proposals should include a written narrative identifying exactly what specialized housing area you propose to evaluate. Please be specific and clearly articulate and expand on the research topic and why it is important. Identify your exact topic, what data will be gathered and what metrics/methodologies you will use to develop your research. **This is the core of your proposal** and should provide a clear and concise narrative description of how you propose to perform the study, including datasets, methodologies and scope and approach. The Agency will be reviewing all proposals to determine which one may provide the most immediate benefit or be of the greatest value. The Agency will be considering the entity's academic research credentials as well as understanding of the attributes of the selected topic proposed for study, the Commonwealth's markets, demographics and affordable housing.

2. **Attach to the narrative, on separate pages:**

- A proposed timeline for the study
- Outline staffing for the study and provide resumes of the principal investigator. (Any academic research groups affiliated with larger institutions must outline their relationships; all study material will become the sole property of the Agency.)
- Provide two professional references for work done of similar scope and timeframe
- Provide budget and cost considerations for the study
- Provide links to a sample research paper/ study completed within the past five years.

Any entity submitting more than one topic for research or specialized study must complete a separate Narrative and supplemental material described above for each separate study.

The Agency does not expect to fund more than one or two of the above specialized studies in 2019.

OTHER IMPORTANT INFORMATION FOR ALL POTENTIAL RESPONDERS:

Two original, signed hard copies of the proposal or two signed soft copies of the proposal in Microsoft Word, Microsoft Excel or Adobe PDF format must be delivered in person or by mail no later than March 1, 2019 **at 2:00 PM EST**. Each responding entity is responsible for ensuring that its proposal is delivered on time to the following address: **Mail completed applications to:**

Bryce Maretzki
Pennsylvania Housing Finance Agency
211 North Front Street
Harrisburg PA, 17101

PHFA reserves the right to amend, adjust, suspend, terminate or modify any or all of the stated services and capabilities as it deems appropriate to best meet its business purposes. We may do so at any time during the RFP process and thereafter we may determine to issue supplemental RFPs and/or to work selectively with one or more responding entities to meet the goals of PHFA. PHFA expects to interview or request additional information from any one or more of the interested applicants to inform its selection and achieve its purposes and expects to work collaboratively to finalize scope, timeframes and budgets for any studies undertaken. PHFA may contact any references or other entities it deems appropriate as part of its evaluation process.

Selected entities will be required to enter into the Agency's standard form of contract for services. A copy of this standard form is available on the Agency's website (under procurement.)

Additional supplemental information may be available with this RFP and will be posted on the website, if applicable. PLEASE check the website (under procurement), review and use any relevant information in preparing your response.

All information submitted will be the property of PHFA and may be subject to disclosure. The costs of all materials submitted is the sole responsibility of the respondents.