



January 4, 2023

AMENDMENT TO REQUEST FOR PROPOSALS

2023 Housing Study 2.0

January 4, 2023-An amendment to this RFP includes the following: Project costs cannot exceed \$157,500 and the project schedule will begin on 1 February and be extended to 18 months with a completion date of 31 August 2024.

The South Sound Military & Communities Partnership (SSMCP) is seeking bids for professional services from professional consulting firms (hereinafter called “Consultant”) to conduct a Housing Study of the Joint Base Lewis McChord / South Sound region. Requests for Proposals (RFPs) can be found on the City’s website at:

<https://cityoflakewood.us/south-sound-military-and-communities-partnership/ssmcp-events-rfps/>

under RFPs, RFQs, Bids. The City of Lakewood will act as the project sponsor. The start date for this project is contingent upon receipt of grant funding from DOD. The SSMCP will serve as the project coordinator, and as the point of contact for consulting services. Following selection, the consultant will prepare a coordinated Work Plan including a refined scope, schedule, budget, and project organization chart.

The SSMCP works to address issues that affect military and civilian communities around JBLM and to foster outcomes that are mutually beneficial for the South Puget Sound region.

The funds provided in this grant would allow SSMCP to accomplish the following tasks while continuing its collaborative partnership with JBLM to ensure continued operations, functions and missions at JBLM:

- 1.) Identify opportunities for collaboration and potential barriers to Active Duty Service Members access to adequate affordable housing near JBLM.
- 2.) Identify opportunities for collaboration to incentivize homeowners, landlords, and property managers that could offer their properties to military families.
- 3.) Identify how off-base housing availability and development can best contribute to lowering the backlog of military family housing need?
- 4.) Compare and contrast two different housing studies developed in 2020.

Submittals must be filed with the City Clerk's Office at 6000 Main Street SW, 3rd floor, Lakewood, Wash., 98499, by 4:30 pm PST on Friday, January 31, 2023. In order to be considered, qualifications and proposals must be received by this date and time. The City of Lakewood reserves the right to reject any and all submittals.

The City of Lakewood does not discriminate on the basis of race, creed, color, ethnicity, national origin, sex, age, or marital status. The selected vendor must be able to demonstrate EEO/ADA compliance.

For additional information, contact Bill Adamson, Program Director for the South Sound Military & Communities Partnership (SSMCP), at 253.983.7772 or e-mail <badamson@cityoflakewood.us>.

REQUEST FOR PROPOSALS
CITY OF LAKEWOOD

PROPOSALS to
Conduct a Housing Study Vicinity of Joint Base Lewis McChord
Professional Services

I. INTRODUCTION AND PURPOSE

The purpose of this Request for Proposals (RFP) is to solicit proposals to establish a contract through competitive negotiation for professional services to assist the South Sound Military & Communities Partnership in conducting a Housing Study in the vicinity of JBLM. A full narrative and needs description for this project is attached as Attachment A.

II. STUDY AREA

III. SCOPE OF WORK

The consultant and/or its sub-consultants will be responsible for completing the tasks in the Scope of Work (Attachment B). Project costs cannot exceed \$135,000. **Amended amount increased to \$157,500.**

IV. PROJECT SCHEDULE

The start date for this project is contingent upon receipt of grant funding from DOD..

~~The project shall be completed by January 15, 2024.~~ **Amended to a start time of 1 February 2023 with a project timeline extended to 31 August 2024. The start date for this project is contingent upon receipt of grant funding from DOD.**

V. PROJECT ORGANIZATION AND MANAGEMENT

The City of Lakewood will act as the project sponsor. The SSMCP will serve as the project coordinator, and as the point of contact for consulting services. Following selection, the consultant will prepare a coordinated Work Plan including a refined scope, schedule, budget, and project organization chart.

VI. REPORTING REQUIREMENTS

The Consultant shall be responsible for the following reporting requirements:

1. Semi-monthly reports to Project Manager that shall include updates on the status of the planning process and the project expense reports.
2. A critical path schedule for the planning effort detailing the start of the project, major deliverable dates, estimated meeting dates and estimated completion dates for the deliverables.
3. Provide complete pricing. Appropriateness and flexibility of pricing arrangements.
4. Any additional services or procedures of benefit to the SSMCP and the City not specifically required herein, which the Contractor offers to provide and believes will be beneficial to the project.
5. Other requirements as determined during the contracting process.

VII. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS

All respondents should submit a written proposal to include information about the respondent directly related to each of the Selection Criteria outlined in Section VIII below. All information should be submitted succinctly. By submitting a proposal, offerors certify that all information provided in response to this RFP is true and accurate.

A. RFP Response:

In order to be considered for selection consultants must submit a complete response to this RFP. Five (5) proposal copies must be submitted no later than 4:30 PM on Friday, January 13, 2023 to:

RFP: Military Installation Resiliency Review
City Clerk, City of Lakewood
6000 Main St SW
Lakewood, WA 98499-5027

B. Proposal Format:

Submit applications on white 8.5 x 11 inch paper only. The proposal and all supporting material shall be limited to 20 pages, (not including cover sheet) and use a standard Arial font. The font size must be 11 point or larger. The margins must be at least one inch on all sides and all pages must be numbered.

C. Proposal Contents:

Proposals shall be signed by an authorized representative of the offeror. All information requested should be submitted. Failure to submit all information requested may result in the City giving a lowered evaluation of the proposal. The City may reject proposals that are substantially incomplete or lack key information. Proposals received after the response time and date will not be opened or considered for award.

D. Proposal Preparation:

Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.

E. Required Proposal Elements:

Proposals should be as thorough and detailed as possible so that the City may properly evaluate the Consultant's capabilities to provide the required services. Consultants are required to submit the following items as a complete proposal:

1. A written narrative statement on Qualifications and Experience:
 - a. Describe the qualifications and experience of the firm in developing plans as described in the Scope of Work.
 - b. Experience with Joint Land Use Study (JLUS) and related Office of Local Defense Community Cooperation (OLDCC) / Economic Adjustment (OEA) projects.
 - c. Expertise in forming and working with multi-agency partnerships.

2. Specific plans for providing the proposed services, including:
 - a. What, when, and how the service will be performed; and
 - b. Ability to complete the project within the estimated time frame.

3. Explain how specific tasks will be accomplished:
 - a. Familiarity with JBLM
 - b. Meetings with subject matter experts in all overlay areas
 - c. Learning about past efforts and assessments

- d. Learning about other military communities of similar size in the U.S. with traffic congestion problems that could impact real world missions
- e. The parties involved in developing this study at a minimum will be JBLM, the City of Lakewood, City of DuPont, Town of Steilacoom, City of Lacey, City of Yelm, City of Tacoma, City of University Place, Thurston County and Pierce County, and the Nisqually Indian Tribe.
- f. Given the substantial complexity of such a multi-part overlay, a robust process including all involved stakeholders would be expected.

The City reserves the right to reject any and all proposals.

The City encourages disadvantaged, minority, veteran, and women-owned consulting firms to respond. The described project is subject to federal funding; any contract award is contingent upon receipt of that funding.

The Consultant shall comply with the regulations relative to nondiscrimination. The Consultant shall comply with the American Disabilities Act of 1992, as amended.

VIII. EVALUATION AND AWARD CRITERIA

A. Evaluation Criteria:

The City will use a Selection Committee to review and evaluate all Statements of Qualification submitted by firms responding to the RFP. The proposals will be evaluated and ranked based on the Evaluation Criteria detailed below. The Selection Committee may choose to ask the top ranked firms to attend a presentation/interview as part of the evaluation process.

The successful consultant is expected to provide a multidisciplinary team with the demonstrated qualifications, experience and expertise to complete the desired analysis, as well as demonstrate a capacity to manage the Project and direct the efforts of the team. Experience in conducting multi-jurisdictional studies involving military installations and familiarity with the content of the 2015 JBLM JLUS study is important. In addition, the consultant must demonstrate an interest in the Project, convey an understanding of the federal and Washington State laws, provide references for similar projects, demonstrate positive public participation skills, show an ability to work within the time schedule and provide the deliverables noted in the Proposed Work Program.

Evaluation Criteria	Point Value
Understanding of project requirements, scope and tasks and quality of proposed approach to address the scope of work.	20
Adherence to RFP instructions.	10
Military & public participation; the ability to effectively communicate with military organizations, federal, state and local governments, tribes, and the general public during a pandemic.	15
Pricing.	10
Capacity of the Respondent to perform the required work activities within the given time limitations, taking into consideration current and planned workload.	10
Experience addressing planning and coordination in urbanized regions experiencing military and civilian growth.	10
Knowledge of the 2022 Growth Coordination Plan, the 2015 JBLM JLUS Study, familiarity with Washington State, and local planning regulations of jurisdictions in Thurston and Pierce counties.	10
Professional qualifications and experience of the individuals the Respondent will assign to provide the required services.	10
Names, addresses and telephone numbers of clients for whom the Respondent has performed projects of similar or related size and type.	5
TOTAL: 100	

B. Award of Contract:

The City shall engage in individual discussions with two or more offerors deemed fully qualified, responsible and suitable on the basis of initial responses and with emphasis on professional competence to provide the required services. Repetitive informal interviews shall be permissible.

Such offerors shall be encouraged to elaborate on their qualifications and performance data or staff expertise pertinent to the proposed project, as well as alternative concepts. The City will provide third party notification should any proprietary information be requested by the public or competitors. At the conclusion of the informal interviews, on the basis of evaluation factors published in the Request for Proposals and all information developed in the selection process to this point, the City shall select, in the order of preference, two or more offerors whose professional qualifications and proposed services are deemed most meritorious. Negotiations shall then be conducted, beginning with the offeror ranked first. If a contract can be negotiated at a price considered fair and reasonable, the award shall be made to that offeror. Otherwise, negotiations with the offeror ranked first shall be formally terminated and negotiations conducted with the offeror ranked second, and so on, until such a contract can be negotiated at a fair and reasonable price.

IV. RFP AVAILABLE ONLINE

Available on-line at: <https://cityoflakewood.us/south-sound-military-and-communities-partnership/ssmcp-events-rfps/>

For further information, please direct questions to Bill Adamson, SSMCP Program Director at 253-983-7772 or badamson@cityoflakewood.us

CITY OF LAKEWOOD
Briana Schumacher
City Clerk

Attachment A: Narrative

Quality affordable housing around JBLM is limited while the demand for housing increases due to the continued growth in the South Puget Sound. The critical question is, how can off-base housing availability and development best contribute to lowering the backlog of military family housing needs? On-base housing remains constant at 5,159 units which are habitually 97% occupied, producing a 1,000+ on-base housing waitlist. With 71% of the active duty force and a total of 87% of the JBLM workforce living off-base in JBLM's surrounding communities, this assessment is very much needed.

This planning study is intended to document the specific purpose and need for increased cooperation, and improved processes for communications, to develop and identify various housing options. Due to rapidly appreciating market conditions, increasing rental rates, and rising mortgage interest rates, the consultant team will update the 2020 SSMCP Housing Study. The previous SSMCP Housing Study completed in 2020 used primarily 2018 and 2019 data – conditions before the global Pandemic.

Additionally, the consultant team will assess two conflicting housing studies (the 2020 SSMCP Housing Study and the 2020 Army Housing Market Analysis (HMA)). The Army HMA is used to determine if additional on-base housing is needed. The Army HMA found a decreasing need for military family housing, from 3,021 in 2020 to only 245 in 2025. Conversely, the SSMCP Housing Study found population is projected to grow significantly in the JBLM Study Area between 2020 and 2040. Approximately 113,000 new off-base housing units are needed in the JBLM Area to accommodate projected future growth by 2040. This illustrates an increasing rather than decreasing housing need. This dichotomy must be better analyzed and understood.

To reflect the complexity of the needed study area, a wide array of partners are involved in the process, including but not limited to:

- JBLM Headquarters and staff
- DoD
- Washington State Department of Commerce
- Nisqually Indian Tribe
- Thurston Regional Planning Council (TRPC)
- Pierce County
- Thurston County
- City of DuPont
- City of Lacey
- City of Lakewood
- City of Rainier
- City of Roy
- Town of Steilacoom
- City of Tacoma
- Tacoma-Pierce County Chamber
- Thurston County Chamber
- Tacoma-Pierce County Health Department

City of Yelm

The consultant(s) will need to communicate with these and other appropriate partners to accomplish the assigned duties. Ensuring military installations can coexist with local communities requires developing mutually acceptable community strategies that can implement adjustments that promote community growth while remaining compatible with military training and operations. At a minimum by the end of the study period greater clarification of the level of coexistence threshold will be determined.

The outcomes of this study should allow the region to further support the mission of JBLM and preserve the maximum operational utility of the installation while meeting community needs for economic development and a high quality of life. This study will document relevant decisions, processes, policies and regulations impacting housing that can be utilized during evaluation of housing options. With continued growth on the installation coupled with the high percentage of the JBLM workforce that resides off-base this study is needed now more than ever.

Attachment B: Scope of Work

The purpose of the study is to define the current housing market in the South Puget Sound and its impacts to the military mission. This study will compare and contrast the results of an Army contracted Housing Market Analysis (HMA) conducted in 2020 with the SSMCP contracted housing study also performed in 2020. Importantly, The Army HMA establishes the need to obtain more on-base housing and informs and proposes changes to the regional cost of living adjustments. The two studies appear to offer significantly different outcomes.

Cross-sector approaches to proactive solutions in addressing this issue will include the potential need for a Department of Defense cost of living allowance (COLA) in the JBLM vicinity. Potential future projects until 2050 are another approach to ensure housing availability with the continued population growth. Public, agency, private, business, and corporate involvement may be needed to evaluate alternatives.

GOALS:

- Determine if the region's housing market is having an adverse impact on military readiness and the impact of the region's housing market on the service member, military families and military readiness. If so, recommend approaches to mitigate the adverse impact.
- Identify actions to be taken during the PCS process and overall in the housing market, (short/long term), to improve mission readiness and the overall quality of life for the

service member and their family. This would of course, include activities that freed up or increased the supply of rental/for-sale housing.

- Develop a plan that can be approved and adopted by local entities that identify the capacity, operational, and safety issues and result in a list of prioritized projects that addresses the goals outlined below.
- Identify opportunities for collaboration and potential barriers to Active Duty Service Members' access to adequate, affordable housing near JBLM.
- Identify opportunities for collaboration to incentivize homeowners, landlords, and property managers that could offer their properties to military families.
- Identify how off-base housing availability and development can best contribute to lowering the backlog of military family housing need?
- Compare and contrast two different housing studies developed in 2020.

The study will explore the following:

- Identify ways to communicate between current rental housing programs with incoming JBLM personnel
- Evaluate options for additional municipalities to adopt housing programs that offer approved housing for Active Duty military service members and their dependents
- Evaluate options for different locales to increase housing opportunities for Active Duty military service members and their dependents
- Evaluate JBLM Rental Partnership Program's incentives and barriers to increasing rental housing participants among homeowners, landlords, and property managers that could offer their properties to more military families.
- Quantify the existing number of landlords and property managers currently renting to active duty families in the JBLM area
- Identify quantity of currently available rental units within 15 miles of JBLM within Pierce and Thurston Counties:
 - 1- bedroom apartments
 - 2- bedroom apartments
 - 2- Bedroom townhouse/duplexes
 - 3- Bedroom single-family detached houses
 - 4- Bedroom single-family detached houses
- Identify JBLM options for opportunities for collaborations with local jurisdictions to increase quality affordable housing near JBLM.

- Analyze how has the South Sound housing market changed since the Pandemic? Did JBLM's presence in the South Sound help to stabilize or improve the regional housing market?
- Identify legislative action needed to allow for increased housing capacity
- Analyze rental and for-sale shortages, now and into the future (on/off installation).
- Identify barriers to landlord participation in the RPP program
- Identify impacts on command readiness – the amount of time service member needs to settle family affairs
- Identify the percentage/# of renters vs buyers in the military versus percentages who can qualify for each. (comparing family income/rank with actual purchase/renting data).

Task 1.0 Develop Project Work Plan and conduct Kick-Off Meetings

1.1 Finalize the Work Plan, project schedule, and list of Project Stakeholders

1.2 With Project Stakeholders, define the project study area

Task 2.0 Interview key stakeholders to gain their perspective on the effectiveness of existing programs, regulations and resourcing for additional municipalities to adopt housing programs that offer approved housing for Active Duty military service members and their dependents

2.1 Develop a network diagram showing stakeholder roles and responsibilities, recommend other value-added organizations for project stakeholder group.

2.2 Assess effectiveness of key affordable housing programs (i.e. Lakewood Rental Housing Safety, Tacoma Equity housing...)

2.3 Evaluate JBLM current housing program opportunities for collaboration with municipalities.

2.4 Evaluate private, corporate and businesses party creative solution options to support Active Duty with increased options for quality affordable housing

2.5 Assess problem areas (i.e. cost of living comparison, housing market availability, JBLM mission readiness and operations tempo)

2.6 Recommend ways to integrate and improve the current housing programs as part of this study.

Task 3.0 Evaluate options for different locales to increase housing opportunities for Active Duty military service members and their dependents

Task 4.0 Evaluate existing policies, identify shortfalls / gaps in policy, and recommend ways to improve housing availability

Task 5.0 Compare and contrast two different housing studies developed in 2020: The 2020 SSMCP Housing Study and the 2020 DOD Housing Market Analysis for JBLM.

- 5.1 Determine the differences between the two sets of findings and explain why they are different.
- 5.2 Determine the impact to the JBLM community of having conflicting findings. Recommend a way to rectify the perceived gaps in understanding the outcomes of these two studies.

Task 6. Project Final Report

6.1 The Contractor shall handle the development of a final project report, including all the deliverables and activities listed below:

- Outline for Housing Study 2.0 Final Report
- Draft Housing Study 2.0 Report
- Present Draft Report to Technical Review Committee, Policy Committee, and Relevant Entities
- Incorporate installation feedback into the final report
- Complete Final Deliverables: Housing Study 2.0 Report and Supporting Documents; Rental availability data; High-level summary recommendations memo.

The Contractor shall review and incorporate all input and feedback from SSMCP and the DoD OLDCC. All final documents will require approval for release from JBLM. The contractor will work with SSMCP to incorporate changes and feedback from the military installations and surrounding Counties. The final report will prioritize all projects from each of the installations into a single regional list.