

CITY OF LAKEWOOD REQUEST FOR PROPOSAL (RFP)

PURPOSE OF REQUEST

The Lakewood seeks proposals from consulting firms and/or individuals with proven expertise and understanding of the U.S. Department of Housing and Urban Development (HUD) Community Development Block Grant (CDBG) and HOME Investment Partnership Programs for the preparation of its 2025-2029 Consolidated Plan (CONPLAN), and update to the Analysis of Impediments to fair housing choice (AI). The document is needed so the jurisdiction can pursue entitlement funding for housing and community development activities in accordance with the requirements established by the federal Department of Housing and Urban Development (HUD) based upon the provisions of the National Affordable Housing Act of 1990, as amended.

The Consolidated Plan to be produced by this process is to serve as the planning document (comprehensive housing affordability strategy and community development plan) for HUD's Community Planning and Development formula grant programs within the city, including the Community Development Block Grant (CDBG) and HOME Investments Partnership Program, for the program years 2025-2029. As such, it is to meet all requirements provided at the following places.

- 24 CFR Part 91, as interpreted by HUD
- All relevant HUD websites, including http://portal.hud.gov/hudportal/HUD?src=/program_offices/comm_planning/about/complan
- HUD's Consolidated Plan Manual at: <https://www.hudexchange.info/programs/consolidated-plan/guides/#consolidated-plan-template-in-idis>
- HUD's eCon Planning Suite at: <https://www.hudexchange.info/consolidated-plan/econ-planning-suite/>
- HUD's Integrated Disbursement Information System (IDIS)

This plan is to replace and build upon the City's adopted 2020-2024 Consolidated Plan.

Please see the Sample IDIS Electronic Consolidated Plan Template included as "Exhibit A" to this RFP.

The Analysis of Impediments (AI) to fair housing choice that is to be produced by this process must satisfy the requirements of the Housing and Community Development Act of 1974, as amended. The act requires that each jurisdiction receiving CDBG, and HOME funds plan and take actions to overcome impediments to fair housing. The analysis of impediments to be produced by the consultant must meet all requirements for such documents provided by HUD.

The AI involves public and private policies, practices and procedures affecting housing choice. The AI should incorporate input and cooperation from other government agencies, the community and business organizations. In summary, the AI i) Serves as the substantive

logical basis for fair housing policy; ii) Provides essential and detailed information to policy makers, administrative staff, housing providers, lenders, and fair housing advocates; and iii) Assists in building public support for fair housing efforts both within a State or Entitlement jurisdictions/boundaries and beyond. The AI will comply with all requirements as prescribed by HUD. The selected consultant is expected to update the City's most recent Analysis of Impediments to Fair Housing.

This project is to be funded with Federal Community Development Block Grant (CDBG) monies. City staff will assist in scheduling the public meetings that are required as part of this project, and will provide contact information for the partner organizations that must be included in the planning process. Upon completion, City staff will enter the final plan into IDIS and submit it to HUD.

BACKGROUND:

Since July 2000, both the city of Tacoma and Lakewood have formed a joint Consortium for HOME Investment Partnership Act funds to provide housing programs for low- and moderate-income individuals. The City of Tacoma is the lead agency of the HOME Consortium.

RFP PROCESS

This is a notice of "Request for Proposals" for consultants. The specific purpose is to hire a consultant(s) to help update the existing Consolidated Plan including policies and performance measures related to expenditures and to update the existing Analysis of Impediments to fair housing choice. Based on a review of the submitted proposals, up to three (3) consultants may be selected for an interview. The interview, in conjunction with the proposal and qualifications submitted, will be used to identify the consultant(s) selected. The City of Lakewood will approve the final consultant agreement.

TIME SCHEDULE

The City will follow the time table below, which should result in a selection of a firm in August 2024

Issue RFP..... August 2, 2024
Deadline for receiving proposals..... August 19, 2024 (4:00 PM)
Contract Award..... September 2, 2024

INSTRUCTIONS TO PROPOSERS:

- One copy (not to exceed 20 pages) of the "Request for Proposal" must be labeled "Consolidated Plan 2025-29, be placed in sealed envelopes addressed to the following persons:

Jeff Gumm, Housing Division Manager
Department of Planning & Public Works
City of Lakewood
6000 Main Street SW

Lakewood, WA 98499

For questions, contact Jeff Gumm at (253) 983-7773

TERMS AND CONDITIONS

- The City reserves the right to reject any and all proposals, and to determine and waive minor irregularities in any proposal.
- The City reserves the right to request clarification of information submitted, and to request additional information from any proposer.
- The City reserves the right to determine the most qualified contractor based on the City's evaluation of the above selection criteria and any factors relevant thereto.
- The City reserves the right to award contracts for all or some of the tasks in the scope of the work to one or more consultant(s) as part of a team to complete the tasks in the Scope of Work.
- The City reserves the right to award any contract to the next most qualified contractor, if the successful contractor does not execute a contract within thirty (30) days after the award of the proposal.
- The City shall not be responsible for any cost incurred by the firm in preparing, submitting or presenting its response to the RFP.

SELECTION CRITERIA

- Experience and background of personnel assigned to the project;
- Successful, recent and relevant experience in accomplishing Consolidated Plans, developing housing policies, and guidelines/performance measures for expenditure of Community Development Block Grant (CDBG), HOME Investment Partnership funds and other available financial resources;
- Past record in the timely and efficient management of projects referenced above, including documentations that the projects were implemented on budget and on time;
- Quality of work products and successful implementation of related work;
- Experience in facilitating public meetings and making presentations before public agencies, citizen groups and elected officials; and
- Other selection criteria shall include: (a) responsiveness of the written proposal and/or interviews to the purpose and scope of the service; (b) price; (c) a history of successful contracts of this type and (d) an ability to adhere to projected deadlines and demonstrated experience in similar work.

Information to be a part of the response includes:

- For all projects similar to this request for proposals, a listing of the clients, contract amount, contact person, and their phone number.
- Other references who would be helpful to contact. The information provided should include reference name, phone number, and why they are being suggested as a reference.

SCOPE OF WORK

The following scope of work shall be completed for the City of Lakewood to facilitate the development of their respective Five-year 2025-2029 Consolidated Plan for Housing and Community Development and the Analysis of Impediments to fair housing choice.

- Meet with staff from the City of Lakewood to prepare the final Scope of Work on the development of the Joint 2025-2029 Consolidated Plan.
- Conduct community outreach including 4 focus group interviews with agencies, housing, providers, realtors / lenders, neighborhood associations, CDBG/Citizens Advisory Board, Tacoma Community Redevelopment Authority (TCRA) and others identified jointly with the City of Lakewood.
- Conduct an online poll to gather public input on uses of funds for CDBG and HOME programs.
- Implement citizen involvement activities related to development, preparation, review and approval of the Consolidated Plan and consult and/or coordinate with private and public agencies including and not limited to City of Tacoma, City of Lakewood, Pierce County, housing providers, health service providers, public health agencies, social service providers, child welfare agencies, public housing authorities, developers, appraisers, realtors, mortgage brokers/bankers, housing rental agencies, home builders/contractors, housing development organizations, homeless shelter providers, and adjacent local governments;
- Present a draft plan to the City of Lakewood Community Services Advisory Board and City Council;
- Participate in appropriate public meetings, public hearings and/or citizen committee meetings, and City Council meetings;
- Update data and studies related to population, housing stock, conditions and types of housing, number and type of families in need of housing, need for special housing, nature and extent of homelessness, homeless needs, housing market analysis, public and assisted housing characteristics, and barriers to affordable housing. Review and update additional data on projections of housing needs, populations, economy and employment, market conditions, fair housing needs and activities;

- Develop and update strategies and objectives for providing affordable housing, emergency shelters, transitional housing, special needs housing and community development needs within the City of Lakewood;
- Conduct technical studies and analysis of community development needs, including capital/public facilities, social services and economic development needs;
- Prepare a new 2025-2029 Consolidated Plan for Housing and Community Development and an updated Analysis of Impediments to Fair Housing pursuant to applicable federal requirements as shown in the Code of Federal Regulations (CFRs).
- The Consolidated Plan will contain at a minimum the following key elements:
 - (1) *Housing and Community Development Needs Assessment* that describes the housing market, housing needs of the low-income, homeless and special populations, capital facility's needs, infrastructure needs, public service needs, and information on other needs identified for the Lakewood community.
 - (2) *Five Year Strategy* that describes resources for the investment of funding, a description of programs and activities and strategies to meet identified needs. Priority consideration will be given to assisting low-income, homeless and special needs groups. The strategies must also complement the goals and objectives of the City's Comprehensive Plan.

NOTE: City staff will assist in the development the Annual Action Plan, identifying specific steps to be taken to address the needs identified in the Five-Year Strategy, describing how resources will be allocated, strategies and other actions to be implemented through proposed use of 2025-26 federal HUD funding.

 - Provide a copy of the approved final documents; an electronic copy shall also be provided with the final document in Microsoft Office Word format compatible with IDIS Consolidated Plan template.
 - Provide a resource binder to include, at a minimum, a list of data sources, backup of data collected, consultation records, correspondence, and other supporting documentation used in the developing the AI. Electronic submission acceptable.

PROJECT SCHEDULE

The absolute deadline for completion and adoption by the City Council of the Consolidated Plan is the beginning of May 2025. The deadline for submission of the document is May 15, 2025. **Adherence to the deadline will be strictly required in the contract with substantial penalties if not met.**

Five-Year 2025-2029 Consolidated Plan:

Citizen Participation and Outreach	October 2024 – Dec. 2024
Needs Assessment	Dec. 2024 – Jan. 2024
Market Analysis	January 2024
Strategic Plan	Jan. 2025 – Feb. 2025
Draft Consolidated Plan	Mar. 3, 2025
Final Consolidated Plan	April 21, 2025

Update to Analysis of Impediments to Fair Housing:

Evaluation of Policies and Practices	Nov. 2024 - Dec. 2024
Identification of Impediments	Dec. 2024 - Jan. 2025
Fair Housing Action Plan	Jan. 2025 – Feb. 2025
Final Analysis of Impediments	Mar. 10, 2025

COMPENSATION

- Please present detailed information on the firm’s proposed fee schedule for the work specifications and for any variation for non-routine services, inclusive of Washington State sales tax and any other applicable government charges. Please provide specifics as to definitions of routine versus non-routine tasks, what is fixed as opposed to variable, and how costs are adjusted according to that classification.
- Provide an line item bid for each of the following items: 1) 5-YR 2025-2029 Consolidated Plan; 2) Analysis of Impediments to Fair Housing; and 3) Outreach activities related to the 5-YR 2025-2029 Consolidated Plan.
- Payment for the aforementioned services will only be made after the services have been performed, an itemized billing statement is submitted in a form specified by the city and approved by the appropriate representatives, which shall specifically set fort the services performed. Payment will be made in accordance with the payable payment cycles based upon a signed consultant agreement with the City.

EXHIBIT A

5-YR 2025-29 Consolidated Plan

See eCon Planning Suite Desk Guide for template specifics and information at:
<https://www.hudexchange.info/resource/2641/econ-planning-suite-desk-guide-idis-conplan-action-plan-caper-per/>

Template below is a sample from 2020-24 5-YR Con Plan for Tacoma-Lakewood.

Executive Summary

ES-05 Executive Summary - 24 CFR 91.200(c), 91.220(b)

1. Introduction
2. Summary of the objectives and outcomes identified in the Plan Needs Assessment Overview
3. Evaluation of past performance
4. Summary of citizen participation process and consultation process
5. Summary of public comments
6. Summary of comments or views not accepted and the reasons for not accepting them
7. Summary

The Process

PR-05 Lead & Responsible Agencies 24 CFR 91.200(b)

1. Describe agency/entity responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source

The following are the agencies/entities responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.

Agency Role	Name	Department/Agency
CDBG Administrator		Tacoma Community Redevelopment Authority
HOME Administrator		Tacoma Community Redevelopment Authority
ESG Administrator		Tacoma Community Redevelopment Authority

Table 1 – Responsible Agencies

Narrative

Consolidated Plan Public Contact Information

PR-10 Consultation - 91.100, 91.200(b), 91.215(l)

1. Introduction

Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(l)).

Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness

Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards and evaluate outcomes, and develop funding, policies and procedures for the administration of HMIS

2. Describe Agencies, groups, organizations and others who participated in the process and describe the jurisdictions consultations with housing, social service agencies and other entities

Table 2 – Agencies, groups, organizations who participated

Identify any Agency Types not consulted and provide rationale for not consulting

Other local/regional/state/federal planning efforts considered when preparing the Plan

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?

Table 3 – Other local / regional / federal planning efforts

Describe cooperation and coordination with other public entities, including the State and any adjacent units of general local government, in the implementation of the Consolidated Plan (91.215(I))

Narrative (optional):

PR-15 Citizen Participation

- 1. Summary of citizen participation process/Efforts made to broaden citizen participation
Summarize citizen participation process and how it impacted goal-setting**

Citizen Participation Outreach

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (if applicable)

Table 4 – Citizen Participation Outreach

Needs Assessment

NA-05 Overview

Needs Assessment Overview

NA-10 Housing Needs Assessment - 24 CFR 91.205 (a,b,c)

Summary of Housing Needs

Demographics	Base Year: 2000	Most Recent Year: 2010	% Change
Population	193,556	198,819	3%
Households	76,127	80,003	5%
Median Income	\$37,879.00	\$47,862.00	26%

Table 5 - Housing Needs Assessment Demographics

Data Source: 2000 Census (Base Year), 2006-2010 ACS (Most Recent Year)

Number of Households Table

	0-30% HAMFI	>30- 50% HAMFI	>50- 80% HAMFI	>80- 100% HAMFI	>100% HAMFI
Total Households *	12,380	9,815	14,385	8,515	34,905
Small Family Households *	3,765	3,130	5,105	3,265	18,335
Large Family Households *	775	700	1,375	595	2,160
Household contains at least one person 62-74 years of age	1,720	1,845	2,050	1,110	4,750
Household contains at least one person age 75 or older	1,780	1,625	2,100	735	2,080
Households with one or more children 6 years old or younger *	2,385	1,625	2,735	1,280	3,850

* the highest income category for these family types is >80% HAMFI

Table 6 - Total Households Table

Data Source: 2006-2010 CHAS

Housing Needs Summary Tables

1. Housing Problems (Households with one of the listed needs)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Substandard Housing - Lacking complete plumbing or kitchen facilities	310	270	200	80	860	15	50	25	35	125
Severely Overcrowded - With >1.51 people per room (and complete kitchen and plumbing)	180	105	170	50	505	0	40	15	20	75
Overcrowded - With 1.01-1.5 people per room (and none of the above problems)	200	170	165	55	590	10	125	175	75	385
Housing cost burden greater than 50% of income (and none of the above problems)	6,185	2,005	595	50	8,835	1,435	1,880	1,905	465	5,685
Housing cost burden greater than 30% of income (and none of the above problems)	1,010	2,735	3,010	570	7,325	360	535	2,110	1,845	4,850

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
Zero/negative Income (and none of the above problems)	655	0	0	0	655	310	0	0	0	310

Table 7 – Housing Problems Table

Data Source: 2006-2010 CHAS

2. Housing Problems 2 (Households with one or more Severe Housing Problems: Lacks kitchen or complete plumbing, severe overcrowding, severe cost burden)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Having 1 or more of four housing problems	6,875	2,550	1,130	235	10,790	1,460	2,090	2,115	595	6,260
Having none of four housing problems	2,405	3,745	6,640	3,780	16,570	680	1,430	4,500	3,905	10,515
Household has negative income, but none of the other housing problems	655	0	0	0	655	310	0	0	0	310

Table 8 – Housing Problems 2

Data Source: 2006-2010 CHAS

3. Cost Burden > 30%

	Renter				Owner			
	0-30% AMI	>30- 50% AMI	>50- 80% AMI	Total	0-30% AMI	>30- 50% AMI	>50- 80% AMI	Total
NUMBER OF HOUSEHOLDS								
Small Related	2,745	1,730	1,330	5,805	430	855	1,860	3,145
Large Related	580	270	350	1,200	145	365	630	1,140
Elderly	1,485	1,225	635	3,345	800	860	880	2,540
Other	3,005	1,920	1,425	6,350	435	525	810	1,770
Total need by income	7,815	5,145	3,740	16,700	1,810	2,605	4,180	8,595

Table 9 – Cost Burden > 30%

Data 2006-2010 CHAS
Source:

4. Cost Burden > 50%

	Renter				Owner			
	0-30% AMI	>30- 50% AMI	>50- 80% AMI	Total	0-30% AMI	>30- 50% AMI	>50- 80% AMI	Total
NUMBER OF HOUSEHOLDS								
Small Related	2,415	540	275	3,230	415	705	685	1,805
Large Related	450	155	15	620	125	275	290	690
Elderly	1,105	575	210	1,890	555	555	490	1,600
Other	2,670	910	150	3,730	350	470	475	1,295
Total need by income	6,640	2,180	650	9,470	1,445	2,005	1,940	5,390

Table 10 – Cost Burden > 50%

Data 2006-2010 CHAS
Source:

5. Crowding (More than one person per room)

	Renter					Owner				
	0-30% AMI	>30- 50% AMI	>50- 80% AMI	>80- 100% AMI	Total	0-30% AMI	>30- 50% AMI	>50- 80% AMI	>80- 100% AMI	Total
NUMBER OF HOUSEHOLDS										
Single family households	235	240	295	100	870	0	90	170	85	345
Multiple, unrelated family households	105	10	4	10	129	10	70	20	10	110

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
Other, non-family households	80	30	55	0	165	0	0	0	0	0
Total need by income	420	280	354	110	1,164	10	160	190	95	455

Table 11 – Crowding Information – 1/2

Data Source: 2006-2010 CHAS

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
Households with Children Present								

Table 12 – Crowding Information – 2/2

Describe the number and type of single person households in need of housing assistance.

Estimate the number and type of families in need of housing assistance who are disabled or victims of domestic violence, dating violence, sexual assault and stalking.

What are the most common housing problems?

Are any populations/household types more affected than others by these problems?

Describe the characteristics and needs of Low-income individuals and families with children (especially extremely low-income) who are currently housed but are at imminent risk of either residing in shelters or becoming unsheltered 91.205(c)/91.305(c)). Also discuss the needs of formerly homeless families and individuals who are receiving rapid re-housing assistance and are nearing the termination of that assistance

If a jurisdiction provides estimates of the at-risk population(s), it should also include a description of the operational definition of the at-risk group and the methodology used to generate the estimates:

Specify particular housing characteristics that have been linked with instability and an increased risk of homelessness

Discussion

NA-15 Disproportionately Greater Need: Housing Problems – 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction

0%-30% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	10,420	2,025	850
White	6,075	1,400	500
Black / African American	1,970	255	185
Asian	655	240	90
American Indian, Alaska Native	144	19	0
Pacific Islander	50	0	0
Hispanic	915	50	50

Table 13 - Disproportionally Greater Need 0 - 30% AMI

Data 2006-2010 CHAS
Source:

*The four housing problems are:

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than one person per room,
4. Cost Burden greater than 30%

30%-50% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	7,510	1,960	0
White	4,875	1,365	0
Black / African American	1,050	235	0
Asian	450	215	0
American Indian, Alaska Native	50	50	0
Pacific Islander	100	0	0
Hispanic	685	85	0

Table 14 - Disproportionally Greater Need 30 - 50% AMI

Data 2006-2010 CHAS
Source:

*The four housing problems are:

1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

50%-80% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	8,285	6,720	0
White	5,410	5,030	0
Black / African American	930	510	0
Asian	785	320	0
American Indian, Alaska Native	70	180	0
Pacific Islander	30	15	0
Hispanic	865	440	0

Table 15 - Disproportionally Greater Need 50 - 80% AMI

Data 2006-2010 CHAS
Source:

*The four housing problems are:

1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

80%-100% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	3,155	5,190	0
White	2,280	3,925	0
Black / African American	340	440	0
Asian	200	325	0
American Indian, Alaska Native	44	55	0
Pacific Islander	40	15	0
Hispanic	155	225	0

Table 16 - Disproportionally Greater Need 80 - 100% AMI

Data 2006-2010 CHAS
Source:

*The four housing problems are:

1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

Discussion

**NA-20 Disproportionately Greater Need: Severe Housing Problems – 91.205
(b)(2)**

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction

0%-30% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	8,985	3,460	850
White	5,210	2,265	500
Black / African American	1,855	370	185
Asian	495	400	90
American Indian, Alaska Native	124	40	0
Pacific Islander	25	25	0
Hispanic	760	195	50

Table 17 – Severe Housing Problems 0 - 30% AMI

Data 2006-2010 CHAS
Source:

*The four severe housing problems are:

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than 1.5 persons per room,
4. Cost Burden over 50%

30%-50% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	3,880	5,585	0
White	2,345	3,895	0
Black / African American	550	730	0
Asian	225	440	0
American Indian, Alaska Native	29	70	0
Pacific Islander	100	0	0
Hispanic	435	335	0

Table 18 – Severe Housing Problems 30 - 50% AMI

Data 2006-2010 CHAS
Source:

*The four severe housing problems are:

1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

50%-80% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	2,890	12,120	0
White	1,770	8,675	0
Black / African American	440	995	0
Asian	284	820	0
American Indian, Alaska Native	20	230	0
Pacific Islander	30	20	0
Hispanic	310	990	0

Table 19 – Severe Housing Problems 50 - 80% AMI

Data 2006-2010 CHAS
Source:

*The four severe housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

80%-100% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	720	7,625	0
White	555	5,645	0
Black / African American	50	730	0
Asian	45	475	0
American Indian, Alaska Native	4	95	0
Pacific Islander	0	55	0
Hispanic	65	320	0

Table 20 – Severe Housing Problems 80 - 100% AMI

Data 2006-2010 CHAS
Source:

*The four severe housing problems are:
1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

Discussion

NA-25 Disproportionately Greater Need: Housing Cost Burdens – 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction:

Housing Cost Burden

Housing Cost Burden	<=30%	30-50%	>50%	No / negative income (not computed)
Jurisdiction as a whole	44,645	18,185	15,465	850
White	33,825	12,745	9,550	500
Black / African American	3,745	1,740	2,775	185
Asian	2,690	1,450	930	90
American Indian, Alaska Native	580	190	170	0
Pacific Islander	275	75	105	0
Hispanic	2,210	1,345	1,225	50

Table 21 – Greater Need: Housing Cost Burdens AMI

Data 2006-2010 CHAS
Source:

Discussion:

NA-30 Disproportionately Greater Need: Discussion – 91.205(b)(2)

Are there any Income categories in which a racial or ethnic group has disproportionately greater need than the needs of that income category as a whole?

If they have needs not identified above, what are those needs?

Are any of those racial or ethnic groups located in specific areas or neighborhoods in your community?

NA-35 Public Housing – 91.205(b)

Introduction

Totals in Use

	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers			Special Purpose Voucher		
				Total	Project - based	Tenant - based	Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
# of units vouchers in use	0	77	906	2,987	532	2,360	50	38	1

Table 22 - Public Housing by Program Type

*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition

Data Source: PIC (PIH Information Center)

Characteristics of Residents

	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers			Special Purpose Voucher		
				Total	Project - based	Tenant - based	Veterans Affairs Supportive Housing	Family Unification Program	
Average Annual Income	0	6,067	12,299	11,976	11,337	12,179	9,770	9,214	
Average length of stay	0	3	5	5	1	6	0	0	
Average Household size	0	1	2	2	3	2	1	3	
# Homeless at admission	0	3	0	0	0	0	0	0	
# of Elderly Program Participants (>62)	0	7	266	547	108	431	7	1	
# of Disabled Families	0	37	337	927	75	825	20	4	
# of Families requesting accessibility features	0	77	906	2,987	532	2,360	50	38	

	Program Type							
	Certificate	Mod-Rehab	Public Housing	Vouchers			Special Purpose Voucher	
				Total	Project - based	Tenant - based	Veterans Affairs Supportive Housing	Family Unification Program
# of HIV/AIDS program participants	0	0	0	0	0	0	0	0
# of DV victims	0	0	0	0	0	0	0	0

Table 23 – Characteristics of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

Race of Residents

Race	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers			Special Purpose Voucher		
				Total	Project - based	Tenant - based	Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
White	0	46	373	1,494	268	1,173	22	25	1
Black/African American	0	23	262	1,197	178	982	27	9	0
Asian	0	4	240	167	50	117	0	0	0
American Indian/Alaska Native	0	3	15	78	18	57	1	2	0
Pacific Islander	0	1	13	51	18	31	0	2	0
Other	0	0	3	0	0	0	0	0	0

*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition

Table 24 – Race of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

Ethnicity of Residents

Ethnicity	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers			Special Purpose Voucher		
				Total	Project - based	Tenant - based	Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
Hispanic	0	10	59	257	55	197	3	2	0
Not Hispanic	0	67	847	2,730	477	2,163	47	36	1

***includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition**

Table 25 – Ethnicity of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

Section 504 Needs Assessment: Describe the needs of public housing tenants and applicants on the waiting list for accessible units:

Most immediate needs of residents of Public Housing and Housing Choice voucher holders

How do these needs compare to the housing needs of the population at large
Discussion

NA-40 Homeless Needs Assessment – 91.205(c)

Introduction:

If data is not available for the categories "number of persons becoming and exiting homelessness each year," and "number of days that persons experience homelessness," describe these categories for each homeless population type (including chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth):

Nature and Extent of Homelessness: (Optional)

Race:	Sheltered:	Unsheltered (optional)
Ethnicity:	Sheltered:	Unsheltered (optional)

Estimate the number and type of families in need of housing assistance for families with children and the families of veterans.

Describe the Nature and Extent of Homelessness by Racial and Ethnic Group.

Describe the Nature and Extent of Unsheltered and Sheltered Homelessness.

Discussion:

NA-45 Non-Homeless Special Needs Assessment - 91.205 (b,d)

Introduction:

**Describe the characteristics of special needs populations in your community:
What are the housing and supportive service needs of these populations and how
are these needs determined?**

**Discuss the size and characteristics of the population with HIV/AIDS and their
families within the Eligible Metropolitan Statistical Area:**

Discussion:

NA-50 Non-Housing Community Development Needs – 91.215 (f)

Describe the jurisdiction's need for Public Facilities:

How were these needs determined?

Describe the jurisdiction's need for Public Improvements:

How were these needs determined?

Describe the jurisdiction's need for Public Services:

How were these needs determined?

Housing Market Analysis

MA-05 Overview

Housing Market Analysis Overview:

MA-10 Number of Housing Units – 91.210(a)&(b)(2)

Introduction

All residential properties by number of units

Property Type	Number	%
1-unit detached structure	53,554	62%
1-unit, attached structure	2,082	2%
2-4 units	7,933	9%
5-19 units	11,948	14%
20 or more units	10,819	12%
Mobile Home, boat, RV, van, etc	391	0%
Total	86,727	100%

Table 26 – Residential Properties by Unit Number

Data 2006-2010 ACS
Source:

Unit Size by Tenure

	Owners		Renters	
	Number	%	Number	%
No bedroom	62	0%	2,940	8%
1 bedroom	1,038	2%	11,146	30%
2 bedrooms	8,244	19%	14,058	38%
3 or more bedrooms	33,907	78%	8,608	23%
Total	43,251	99%	36,752	99%

Table 27 – Unit Size by Tenure

Data 2006-2010 ACS
Source:

Describe the number and targeting (income level/type of family served) of units assisted with federal, state, and local programs.

Provide an assessment of units expected to be lost from the affordable housing inventory for any reason, such as expiration of Section 8 contracts.

Does the availability of housing units meet the needs of the population?

Describe the need for specific types of housing:

Discussion

MA-15 Housing Market Analysis: Cost of Housing - 91.210(a)

Introduction

Cost of Housing

	Base Year: 2000	Most Recent Year: 2010	% Change
Median Home Value	123,400	241,300	96%
Median Contract Rent	513	719	40%

Table 28 – Cost of Housing

Data Source: 2000 Census (Base Year), 2006-2010 ACS (Most Recent Year)

Rent Paid	Number	%
Less than \$500	7,655	20.8%
\$500-999	22,206	60.4%
\$1,000-1,499	5,319	14.5%
\$1,500-1,999	1,025	2.8%
\$2,000 or more	547	1.5%
Total	36,752	100.0%

Table 29 - Rent Paid

Data Source: 2006-2010 ACS

Housing Affordability

% Units affordable to Households earning	Renter	Owner
30% HAMFI	2,650	No Data
50% HAMFI	8,605	709
80% HAMFI	22,515	3,859
100% HAMFI	No Data	11,449
Total	33,770	16,017

Table 30 – Housing Affordability

Data Source: 2006-2010 CHAS

Monthly Rent

Monthly Rent (\$)	Efficiency (no bedroom)	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Fair Market Rent					
High HOME Rent					
Low HOME Rent					

Table 31 – Monthly Rent

Data Source: HUD FMR and HOME Rents

Is there sufficient housing for households at all income levels?

How is affordability of housing likely to change considering changes to home values and/or rents?

How do HOME rents / Fair Market Rent compare to Area Median Rent? How might this impact your strategy to produce or preserve affordable housing?

Discussion

MA-20 Housing Market Analysis: Condition of Housing – 91.210(a)

Introduction

Definitions

Condition of Units

Condition of Units	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
With one selected Condition	15,947	37%	17,510	48%
With two selected Conditions	489	1%	1,172	3%
With three selected Conditions	62	0%	162	0%
With four selected Conditions	0	0%	3	0%
No selected Conditions	26,753	62%	17,905	49%
Total	43,251	100%	36,752	100%

Table 32 - Condition of Units

Data 2006-2010 ACS
Source:

Year Unit Built

Year Unit Built	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
2000 or later	2,568	6%	3,357	9%
1980-1999	7,611	18%	8,101	22%
1950-1979	14,933	35%	15,022	41%
Before 1950	18,139	42%	10,272	28%
Total	43,251	101%	36,752	100%

Table 33 – Year Unit Built

Data 2006-2010 CHAS
Source:

Risk of Lead-Based Paint Hazard

Risk of Lead-Based Paint Hazard	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
Total Number of Units Built Before 1980	33,072	76%	25,294	69%
Housing Units build before 1980 with children present	18,740	43%	18,015	49%

Table 34 – Risk of Lead-Based Paint

Data 2006-2010 ACS (Total Units) 2006-2010 CHAS (Units with Children present)
Source:

Vacant Units

	Suitable for Rehabilitation	Not Suitable for Rehabilitation	Total
Vacant Units			
Abandoned Vacant Units			
REO Properties			
Abandoned REO Properties			

Table 35 - Vacant Units

**Need for Owner and Rental Rehabilitation
Estimated Number of Housing Units Occupied by Low or Moderate Income
Families with LBP Hazards
Discussion**

MA-25 Public and Assisted Housing – 91.210(b)

Introduction

Totals Number of Units

	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers					
				Total	Project - based	Tenant - based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
# of units vouchers available	0	75	918	3,766	592	3,174	404	0	4
# of accessible units									

***includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition**

Table 36 – Total Number of Units by Program Type

Data Source: PIC (PIH Information Center)

Describe the supply of public housing developments:

Describe the number and physical condition of public housing units in the jurisdiction, including those that are participating in an approved Public Housing Agency Plan:

Public Housing Condition

Public Housing Development	Average Inspection Score

Table 37 - Public Housing Condition

Describe the restoration and revitalization needs of public housing units in the jurisdiction:

Describe the public housing agency's strategy for improving the living environment of low- and moderate-income families residing in public housing:

Discussion:

MA-30 Homeless Facilities and Services – 91.210(c)

Introduction

Facilities and Housing Targeted to Homeless Households

	Emergency Shelter Beds		Transitional Housing Beds	Permanent Supportive Housing Beds	
	Year Round Beds (Current & New)	Voucher / Seasonal / Overflow Beds	Current & New	Current & New	Under Development
Households with Adult(s) and Child(ren)					
Households with Only Adults					
Chronically Homeless Households					
Veterans					
Unaccompanied Youth					

Table 38 - Facilities and Housing Targeted to Homeless Households

Describe mainstream services, such as health, mental health, and employment services to the extent those services are used to complement services targeted to homeless persons

List and describe services and facilities that meet the needs of homeless persons, particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth. If the services and facilities are listed on screen SP-40 Institutional Delivery Structure or screen MA-35 Special Needs Facilities and Services, describe how these facilities and services specifically address the needs of these populations.

MA-35 Special Needs Facilities and Services – 91.210(d)
Introduction

Including the elderly, frail elderly, persons with disabilities (mental, physical, developmental), persons with alcohol or other drug addictions, persons with HIV/AIDS and their families, public housing residents and any other categories the jurisdiction may specify, and describe their supportive housing needs
Describe programs for ensuring that persons returning from mental and physical health institutions receive appropriate supportive housing
Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. 91.315(e)
For entitlement/consortia grantees: Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. (91.220(2))

**MA-40 Barriers to Affordable Housing – 91.210(e)
Negative Effects of Public Policies on Affordable Housing and Residential
Investment**

MA-45 Non-Housing Community Development Assets – 91.215 (f)

Introduction

Economic Development Market Analysis

Business Activity

Business by Sector	Number of Workers	Number of Jobs	Share of Workers %	Share of Jobs %	Jobs less workers %
Agriculture, Mining, Oil & Gas Extraction	442	2	1	0	-1
Arts, Entertainment, Accommodations	7,895	8,427	12	10	-2
Construction	3,462	2,612	5	3	-2
Education and Health Care Services	13,372	24,597	20	30	10
Finance, Insurance, and Real Estate	3,967	6,247	6	8	2
Information	1,360	1,065	2	1	-1
Manufacturing	6,308	6,817	9	8	-1
Other Services	5,275	5,681	8	7	-1
Professional, Scientific, Management Services	4,028	4,133	6	5	-1
Public Administration	413	2	1	0	-1
Retail Trade	8,749	10,976	13	13	0
Transportation and Warehousing	3,396	2,787	5	3	-2
Wholesale Trade	3,981	3,925	6	5	-1
Total	62,648	77,271	--	--	--

Table 39 - Business Activity

Data 2006-2010 ACS (Workers), 2010 Longitudinal Employer-Household Dynamics (Jobs)
Source:

Labor Force

Total Population in the Civilian Labor Force	98,794
Civilian Employed Population 16 years and over	89,583
Unemployment Rate	9.32
Unemployment Rate for Ages 16-24	29.76
Unemployment Rate for Ages 25-65	5.29

Table 40 - Labor Force

Data 2006-2010 ACS
Source:

Occupations by Sector	Number of People
Management, business and financial	18,565
Farming, fisheries and forestry occupations	3,935
Service	10,873
Sales and office	14,935
Construction, extraction, maintenance and repair	8,153
Production, transportation and material moving	5,705

Table 41 – Occupations by Sector

Data 2006-2010 ACS
Source:

Travel Time

Travel Time	Number	Percentage
< 30 Minutes	57,100	66%
30-59 Minutes	22,053	26%
60 or More Minutes	6,994	8%
Total	86,147	100%

Table 42 - Travel Time

Data 2006-2010 ACS
Source:

Education:

Educational Attainment by Employment Status (Population 16 and Older)

Educational Attainment	In Labor Force		Not in Labor Force
	Civilian Employed	Unemployed	
Less than high school graduate	5,863	627	5,785
High school graduate (includes equivalency)	19,033	1,841	8,545
Some college or Associate's degree	27,907	2,323	9,002
Bachelor's degree or higher	21,579	924	3,569

Table 43 - Educational Attainment by Employment Status

Data 2006-2010 ACS
Source:

Educational Attainment by Age

	Age				
	18–24 yrs	25–34 yrs	35–44 yrs	45–65 yrs	65+ yrs
Less than 9th grade	489	907	908	2,022	2,105
9th to 12th grade, no diploma	4,430	2,899	2,533	3,006	2,248
High school graduate, GED, or alternative	6,821	8,357	7,096	14,205	7,889
Some college, no degree	7,485	7,804	7,114	13,469	4,701
Associate's degree	1,436	3,283	2,790	5,325	1,079
Bachelor's degree	1,335	4,722	5,055	7,963	2,657
Graduate or professional degree	25	1,899	2,181	4,588	1,919

Table 44 - Educational Attainment by Age

Data 2006-2010 ACS
Source:

Educational Attainment – Median Earnings in the Past 12 Months

Educational Attainment	Median Earnings in the Past 12 Months
Less than high school graduate	20,564
High school graduate (includes equivalency)	30,240
Some college or Associate's degree	34,503
Bachelor's degree	48,467
Graduate or professional degree	61,853

Table 45 – Median Earnings in the Past 12 Months

Data 2006-2010 ACS
Source:

Based on the Business Activity table above, what are the major employment sectors within your jurisdiction?

Describe the workforce and infrastructure needs of the business community: Describe any major changes that may have an economic impact, such as planned local or regional public or private sector investments or initiatives that have affected or may affect job and business growth opportunities during the planning period. Describe any needs for workforce development, business support or infrastructure these changes may create.

How do the skills and education of the current workforce correspond to employment opportunities in the jurisdiction?

Describe any current workforce training initiatives, including those supported by Workforce Investment Boards, community colleges and other organizations.

Describe how these efforts will support the jurisdiction's Consolidated Plan.

Does your jurisdiction participate in a Comprehensive Economic Development Strategy (CEDS)?

If so, what economic development initiatives are you undertaking that may be coordinated with the Consolidated Plan? If not, describe other local/regional plans or initiatives that impact economic growth.

Discussion

MA-50 Needs and Market Analysis Discussion

Are there areas where households with multiple housing problems are concentrated? (include a definition of "concentration")

Are there any areas in the jurisdiction where racial or ethnic minorities or low-income families are concentrated? (include a definition of "concentration")

What are the characteristics of the market in these areas/neighborhoods?

Are there any community assets in these areas/neighborhoods?

Are there other strategic opportunities in any of these areas?

Strategic Plan

SP-05 Overview

Strategic Plan Overview

SP-10 Geographic Priorities – 91.215 (a)(1)

Geographic Area

Table 46 - Geographic Priority Areas

General Allocation Priorities

Describe the basis for allocating investments geographically within the jurisdiction (or within the EMSA for HOPWA)

SP-25 Priority Needs - 91.215(a)(2)

Priority Needs

Table 47 – Priority Needs Summary

Narrative (Optional)

SP-30 Influence of Market Conditions – 91.215 (b)

Influence of Market Conditions

Affordable Housing Type	Market Characteristics that will influence the use of funds available for housing type
Tenant Based Rental Assistance (TBRA)	
TBRA for Non-Homeless Special Needs	
New Unit Production	
Rehabilitation	
Acquisition, including preservation	

Table 48 – Influence of Market Conditions

SP-35 Anticipated Resources - 91.215(a)(4), 91.220(c)(1,2)

Introduction

Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Reminder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		

Table 49 - Anticipated Resources

Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

Discussion

SP-40 Institutional Delivery Structure – 91.215(k)

Explain the institutional structure through which the jurisdiction will carry out its consolidated plan including private industry, non-profit organizations, and public institutions.

Responsible Entity	Responsible Entity Type	Role	Geographic Area Served

Table 50 - Institutional Delivery Structure

Assess of Strengths and Gaps in the Institutional Delivery System

Availability of services targeted to homeless persons and persons with HIV and mainstream services

Homelessness Prevention Services	Available in the Community	Targeted to Homeless	Targeted to People with HIV
Homelessness Prevention Services			
Counseling/Advocacy			
Legal Assistance			
Mortgage Assistance			
Rental Assistance			
Utilities Assistance			
Street Outreach Services			
Law Enforcement			
Mobile Clinics			
Other Street Outreach Services			
Supportive Services			
Alcohol & Drug Abuse			
Child Care			
Education			
Employment and Employment Training			
Healthcare			
HIV/AIDS			
Life Skills			
Mental Health Counseling			
Transportation			
Other			
Other			

Table 51 - Homeless Prevention Services Summary

Describe how the service delivery system including, but not limited to, the services listed above meet the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth)

Describe the strengths and gaps of the service delivery system for special needs population and persons experiencing homelessness, including, but not limited to, the services listed above

Provide a summary of the strategy for overcoming gaps in the institutional structure and service delivery system for carrying out a strategy to address priority needs

SP-45 Goals Summary – 91.215(a)(4)

Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator

Table 52 – Goals Summary

Goal Descriptions

Estimate the number of extremely low-income, low-income, and moderate-income families to whom the jurisdiction will provide affordable housing as defined by HOME 91.315(b)(2)

SP-50 Public Housing Accessibility and Involvement – 91.215(c)
Need to Increase the Number of Accessible Units (if Required by a Section 504
Voluntary Compliance Agreement)
Activities to Increase Resident Involvements
Is the public housing agency designated as troubled under 24 CFR part 902?
Plan to remove the ‘troubled’ designation

SP-55 Barriers to affordable housing – 91.215(h)

Barriers to Affordable Housing

Strategy to Remove or Ameliorate the Barriers to Affordable Housing

SP-60 Homelessness Strategy – 91.215(d)

Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

Addressing the emergency and transitional housing needs of homeless persons
Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again.

Help low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families who are likely to become homeless after being discharged from a publicly funded institution or system of care, or who are receiving assistance from public and private agencies that address housing, health, social services, employment, education or youth needs

SP-65 Lead based paint Hazards – 91.215(i)

Actions to address LBP hazards and increase access to housing without LBP hazards

How are the actions listed above related to the extent of lead poisoning and hazards?

How are the actions listed above integrated into housing policies and procedures?

SP-70 Anti-Poverty Strategy – 91.215(j)

Jurisdiction Goals, Programs and Policies for reducing the number of Poverty-Level Families

How are the Jurisdiction poverty reducing goals, programs, and policies coordinated with this affordable housing plan

SP-80 Monitoring – 91.230

Describe the standards and procedures that the jurisdiction will use to monitor activities carried out in furtherance of the plan and will use to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements

Expected Resources

AP-15 Expected Resources – 91.220(c)(1,2)

Introduction

Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Reminder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		

Table 53 - Expected Resources – Priority Table

Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan Discussion

Annual Goals and Objectives

AP-20 Annual Goals and Objectives

Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator

Table 54 – Goals Summary

Goal Descriptions

Projects

AP-35 Projects – 91.220(d)
Introduction

Projects

#	Project Name

Table 55 – Project Information

Describe the reasons for allocation priorities and any obstacles to addressing underserved needs

AP-38 Project Summary
Project Summary Information

AP-50 Geographic Distribution – 91.220(f)

Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

Geographic Distribution

Target Area	Percentage of Funds

Table 56 - Geographic Distribution

**Rationale for the priorities for allocating investments geographically
Discussion**

Affordable Housing

AP-55 Affordable Housing – 91.220(g)

Introduction

One Year Goals for the Number of Households to be Supported
Homeless
Non-Homeless
Special-Needs
Total

Table 57 - One Year Goals for Affordable Housing by Support Requirement

One Year Goals for the Number of Households Supported Through
Rental Assistance
The Production of New Units
Rehab of Existing Units
Acquisition of Existing Units
Total

Table 58 - One Year Goals for Affordable Housing by Support Type

Discussion

AP-60 Public Housing – 91.220(h)

Introduction

Actions planned during the next year to address the needs to public housing

Actions to encourage public housing residents to become more involved in management and participate in homeownership

If the PHA is designated as troubled, describe the manner in which financial assistance will be provided or other assistance

Discussion

AP-65 Homeless and Other Special Needs Activities – 91.220(i)

Introduction

Describe the jurisdictions one-year goals and actions for reducing and ending homelessness including

Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

Addressing the emergency shelter and transitional housing needs of homeless persons

Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again

Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); or, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs

Discussion

AP-75 Barriers to affordable housing – 91.220(j)

Introduction:

Actions it planned to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment

Discussion:

AP-85 Other Actions – 91.220(k)

Introduction:

Actions planned to address obstacles to meeting underserved needs

Actions planned to foster and maintain affordable housing

Actions planned to reduce lead-based paint hazards

Actions planned to reduce the number of poverty-level families

Actions planned to develop institutional structure

Actions planned to enhance coordination between public and private housing and social service agencies

Discussion:

Program Specific Requirements

AP-90 Program Specific Requirements – 91.220(I)(1,2,4)

Introduction:

Community Development Block Grant Program (CDBG)

Reference 24 CFR 91.220(I)(1)

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

1. The total amount of program income that will have been received before the start of the next program year and that has not yet been reprogrammed
 2. The amount of proceeds from section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives identified in the grantee's strategic plan
 3. The amount of surplus funds from urban renewal settlements
 4. The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan.
 5. The amount of income from float-funded activities
- Total Program Income

Other CDBG Requirements

1. The amount of urgent need activities

HOME Investment Partnership Program (HOME)

Reference 24 CFR 91.220(I)(2)

1. A description of other forms of investment being used beyond those identified in Section 92.205 is as follows:
2. A description of the guidelines that will be used for resale or recapture of HOME funds when used for homebuyer activities as required in 92.254, is as follows:
3. A description of the guidelines for resale or recapture that ensures the affordability of units acquired with HOME funds? See 24 CFR 92.254(a)(4) are as follows:
4. Plans for using HOME funds to refinance existing debt secured by multifamily housing that is rehabilitated with HOME funds along with a description of the refinancing guidelines required that will be used under 24 CFR 92.206(b), are as follows:

**Emergency Solutions Grant (ESG)
Reference 91.220(l)(4)**

1. Include written standards for providing ESG assistance (may include as attachment)
2. If the Continuum of Care has established centralized or coordinated assessment system that meets HUD requirements, describe that centralized or coordinated assessment system.
3. Identify the process for making sub-awards and describe how the ESG allocation available to private nonprofit organizations (including community and faith-based organizations).
4. If the jurisdiction is unable to meet the homeless participation requirement in 24 CFR 576.405(a), the jurisdiction must specify its plan for reaching out to and consulting with homeless or formerly homeless individuals in considering policies and funding decisions regarding facilities and services funded under ESG.
5. Describe performance standards for evaluating ESG.

Discussion:

Appendix - Alternate/Local Data Sources

5-YR 2025-2029 CONSOLIDATED PLAN GENERAL SCOPE OF WORK

1.0 INTRODUCTION

1.1.1 The City of Lakewood ("City") is seeking proposals from qualified and experienced professional community development consultant firms or individual consultants to assist the City in preparing the FY 2025-2029 Five-Year Consolidated Plan (ConPlan) and Analysis of Impediments to Fair Housing ("AI"). The development of the ConPlan requires coordination with the City of Tacoma, as Tacoma is the lead agency in the Tacoma-Lakewood HOME Consortium. As part of this process, the consultant will also be required to present information to citizens and stakeholders regarding the various plans being developed.

1.1.2 ConPlan- Respondents will follow the Consolidated Plan requirements at HUD CPD Notice-12-009, related documents, and the Consolidated Plan IDIS Desk Guide found at: <https://www.hudexchange.info/resource/2641/econ-planning-suite-desk-guide-idis-conplan-action-plan-caper-per/> regarding the Consultation (PR - 10), Citizen Participation (PR - 15), and Needs Assessment (NA) and Lakewood Housing Market Analysis (GHMA) sections of the Consolidated Plan. Consultants must be willing to commit to a timeline that includes several phases over the next year; i.e. information gathering, data collection, stakeholder consultation and public meetings, pre - draft review, drafting & review, IDIS submission, and post-draft follow-up. The HUD - CPD programs included in this RFP are the Community Development Block CDBG, and HOME.

1.1.3 The City is responsible for preparing and implementing the ConPlan which includes identifying the needs of the community and carrying out various projects and programs with the use of HUD funding. As a recipient of HUD formula funds, the City is required to submit to HUD a series of reports to include a Five-Year Consolidated Plan. The Con Plan serves as the planning document which builds on a participatory process with citizens, organizations, businesses, and other stakeholders. It identifies a series of housing and community development priorities in which the City, over a five-year period, will invest CDBG and HOME funds. ConPlan requirements are enacted through 24 Code of Federal Register (CFR) 91 which regulates the formula grant funding intended to assist primarily low to moderate income persons and meet HUD defined national objectives.

1.1.4 Funding for the ConPlan and AI will come from annual CDBG funds and are subject to the regulations under Title 24 CFR, Part 91. Funding for the Community Needs Survey relating to the Opioid Epidemic will come from the

state opioid settlement. Staff from the City will assist and participate in the public meetings that are required as part of this project and will provide contact information for the partner organizations that must be included in the planning process.

For the purposes of this RFP, the following terms shall be defined as follows:

Definitions:

Agreement: The written document between the City and a consultant, which contains the terms and conditions of the business relationship for the City. The Agreement includes a written statement of work, or the specifications including special provisions in the Proposal. Supplemental changes or arrangements pertaining to the work, term, price or other elements of the Agreement shall also become a part of the Agreement.

Analysis of Impediments to Fair Housing Choice (AI): A report required by HUD which investigates and assesses the current state of fair housing issues for the City and includes the steps that will be performed by the City to meet further the purposes of the Fair Housing Act of 1968.

Annual Action Plan (AAP): The Consolidated Plan is carried out through Annual Action Plans which provide a concise summary of the actions, activities and specific federal and non-federal resources that will be used each year to address the priority needs and specific goals identified in the Cities. This document is required by HUD and serves as application for federal funding.

CDBG: Community Development Block Grant, a formula grant from the Federal Department of HUD.

Citizen Participation Plan: A document required by HUD that describes the Cities processes for soliciting input and consultation from local citizens and stakeholders in regard to entitlement grant funding and priorities.

Consultant: Any individual, company, firm, corporation, partnership or other organization to whom a contract award is made by the City.

eCon Planning Suite: A Consolidated Plan template that provides a uniform, web-based format to help grantees ensure that their Consolidated Plan includes all required elements per HUD regulations.

Five-Year Consolidated Plan (Con Plan): The document that is submitted to HUD which serves as the planning document of the Cities and an application

for CDBG and HOME funding. The document is developed in accordance with 24 CFR Part 91 and sets forth the priorities and strategies of the programs for a five-year period. The Consolidated Plan is carried out through Annual Action Plans, which provide a concise summary of the actions, activities and the specific federal and non-federal resources that will be used each year to address the priority needs and specific goals identified by the Consolidated Plan.

HOME Consortium: Under the HOME Program of the U.S. Department of Housing and Urban Development (HUD), local governments are able to join together to form a “consortium” in order to receive HOME funding for affordable housing. Forming a consortium enables local governments that would not otherwise qualify for HOME Program funding under the formula criteria to join with other units of local government to receive a direct allocation of funds. The cities of Tacoma and Lakewood, with the Tacoma acting as the Lead Agency, make up the HOME Consortium for purposes of this Scope of Work.

HOME: HOME Investment Partnership Program a formula grant from HUD.

RFP: Request for Proposal

Respondent: The person, partnership, company, firm, association, nonprofit, or corporation that submits a written Proposal for consideration to perform the work as described in the Request for Proposal.

Responsive: A person, partnership, company, firm, association, corporation or nonprofit who has submitted a Proposal which conforms in all material aspects to the requirements stated in the RFP.

1.2 SCOPE

1.2.1 The FY 2025-2029 ConPlan combines the planning and application requirements of certain federal statutes and includes a Needs Assessment and Market Analysis outlining levels of relative need in the areas of affordable housing, homelessness, special needs, and community development. Consultation with local agencies, public outreach, a review of demographic and economic data sets, and a housing market analysis will be required.

The period of this ConPlan is July 1, 2025 through June 30, 2029. The ConPlan must meet all requirements of the federal regulations and must follow the HUD guidance for the Econ Planning Suite. This is a firm deadline project document; we must have a draft document for public comment completed by March 30, 2025, and a completed document submitted to HUD no later

Commented [JG1]: We have to have and ad to publish to the TNT on the 30th or 31st. In order to do that we have to take it to our Councils to make sure they are ok with the Plan as drafted. I have to do that on 3/9 or 3/23. If we get it on the 30th we won't have time for Council to review and we won't have any time to change it and still make our 30 day comment period work. This timeline does not build in any time to rework or for possible delays. Not good. Should be 2/27. You could leave this sentence and add a second that says, "A final draft Con Plan document shall be provided to the Cities in electronic form no later than February 27, 2020."

than May 15, 2025. A final draft Con Plan document shall be provided to the City in electronic form no later than March 3, 2025.

1.2.2 The FY 2025 Annual Action Plan (AAP) is adopted prior to the beginning of each fiscal year and identifies the programs and funding the City's plan to implement in conformance with its ConPlan. Entitlement program funds are appropriated in the Annual Action Plan to programs and activities that meet the ConPlan goals. There are five Annual Action Plans that will be administered under the FY 2025-2029 Consolidated Plan. Preparing the first year of the Annual Action Plan is a part of the scope of services under this RFP.

1.2.4 The Consultant, with City review, shall be primarily responsible for work related to project management for study preparation, preparing all required components of the study, citizen participation, data collection, mapping, analysis and drafting of the study. It should be understood that the City has limited professional staff available to support the project and will rely on the personnel, experience and expertise of the Consultant to ensure all necessary components of the process and plan are completed in a timely manner.

1.2.5 The selected Consultant will be expected to confer with a broad spectrum of public and private agencies that provide subsidized and assisted housing, health, employment and social services to very-low, low and moderate-income persons, seniors, homeless, female heads of households, and disabled persons. The resulting reports should provide a direct link between community goals and objectives, priority needs and include clear actionable direction for implementing the ensuing one-year action plans.

1.2.6 Where appropriate, the summary narrative should provide tables, charts, graphs, and maps in order to enhance or illustrate the written narrative. The use of GIS, Excel, and other graphic generating software is encouraged to provide clear, concise graphics for the plan. The Consultant will be required to submit all documentation to the City, in the form of Word, Excel, PDF, TIF, JPEG and other necessary forms and into the Integrated Disbursement and Information System (IDIS). The Consultant shall provide sufficient staffing and be available as needed to meet the estimated deadlines throughout the project.

1.2.7 The City is requiring that costs for certain items such as reproduction and publication of notices be omitted as the City will be responsible for these expenses.

1.2.8 The City is requiring the cost for preparation of the ConPlan, preparation of the AI, and outreach activities related to the 5-YR ConPlan be presented as separate line items.

1.3 FIVE -YEAR CONSOLIDATED PLAN

1.3.1 The Consultant shall develop, organize and prepare the July 1, 2025 - June 30, 2029 Five-Year Consolidated Plan utilizing the eCon Planning Suite in a manner fully compliant with federal guidelines as found in the with Chapter 24 of the Code of Federal Regulations (CFR) Part 91, and which addresses 25 CFR Part 570 and other applicable federal regulations and current requirement, and any changes or revisions therein. It will be grammatically correct and free of spelling errors. All elements of the City's current Con Plan will need to be reviewed and revised to meet the City's current needs.

1.3.2 The Consultant shall perform the following tasks and address the costs associated as enumerated.

1.3.3 Onsite Staff Meetings. Anticipate five, one to two-hour meetings with staff.

1.3.4 Design, Marketing, Distribution and Collection of a Survey Instrument. This instrument will solicit public input on the City's needs that can be addressed with federal grant funds. With the exception of several open-ended questions that will need to be analyzed manually, the instrument should be machine-readable or utilize a community-based internet survey.

1.3.5 Data Collection, Need Assessment and Services Gaps. Provide a methodology to determine the community needs and gaps in services, which target specific groups, assess the existing community need as necessary to develop new strategies, goals, and priorities, development of new strategies, objectives, priorities and programs for inclusion in the ConPlan and AAP. Develop and incorporate a performance measure component as required by HUD regulations. Perform relevant consultations and data collection to complete the required HUD tables and the analysis of housing and non-housing needs. The Consultant shall gather factual and broad community input through citizen participation and data collection including:

- Review of available data reports and documents;
- Review of current HUD Consolidated Plan regulations and guidance;
- Presentations at community and public meetings and moderating discussions (including preparing, copying and

distributing bilingual handouts as necessary) to gather community input on the community needs;

- Up to four neighborhood and other focus group meetings with community stakeholders, to be determined with the City. The consultant shall include, at a minimum, consultation with representatives from the City of Lakewood and City of Tacoma departments utilizing HUD funds for projects, business community, housing agencies, social service agencies, Community Housing Development Organization (CHDO) representatives, and other organizations or individuals deemed appropriate. Required tasks include but are not limited to, preparation, identifying and securing appropriate venues, preparing and distributing flyers or using other means of marketing the meetings, providing for simultaneous translations in English, Spanish, Taglog, and Korean. Attendance and facilitation at all four meetings is mandatory for the selected Consultant;
- Coordinate information gathering with the Continuum of Care to address the needs of homeless and other necessary homeless service providers in the community;
- Prepare summary of comments, conduct analysis and assess data gathered and develop Five-Year priority recommendations incorporating factual data and public input collected to support those recommendations;
- Using data and information collected, develop written Needs Assessment and Market Analysis in the format required by HUD;
- Develop maps of key data elements such as income, housing, and racial characteristics;
- Adjust Needs Assessment and Market Analysis from the eCon Planning Suite submission document to one suitable for public distribution and comment.

1.3.6 The plans should meet HUD's requirements and deadline for required Plans:

- Development of the Plans should use existing data to help determine housing, homeless, special population, and community development needs. To the extent it is available, development of the Plans should incorporate the most current data via the U.S. Census Bureau's American Community Survey (ACS);
- Development of the Plans should foster a participatory process that facilitates participation at all levels, especially with low and moderate-income persons, racial/ethnic minorities, and persons

with barriers to participation, including all in legally protected classes;

- Development of the plan should involve consultation with a broad sector of public and private agencies for collaboration and collective problem solving in determining needs, objectives, goals and priorities;
- The Plans should consider all community needs, and resources available to meet those needs.

1.3.7 Based on identified community-based needs, the Consolidated Plan should:

- Indicate general priorities for allocating funds to the various housing and community development needs identified in the Plan;
- Indicate the basis or reason behind the priority level (and relative priority) given to each category of priority need;
- Identify any obstacle to meeting underserved needs by:
 - Summarizing specific objectives for meeting the needs in each priority area;
 - Describing funds reasonably expected to be made available; and
 - Identifying quantifiable proposed accomplishments for each specific objective.

1.3.8 The Plan should report on specific items required by HUD, such as reducing the number of families living in poverty and removing barriers to affordable housing, HUD tables and the analysis of housing and non-housing needs.

- The Plan should be structured to serve as a basis for the City's funding allocation and for assessing performance on an annual basis;
- The Plan should consider established planning documents for the City of Lakewood and Tacoma, including, but not limited to Lakewood and Tacoma's Strategic Plan and Comprehensive Plans, nay Lakewood Subarea Plans, "Tacoma 2025", and Tacoma's Affordable Housing Action Strategy.

1.3.9 Prepare an Executive Summary for the Consolidated Plan and Action Plan

- Assist City staff to assess the existing community need as necessary to develop new strategies, goals, and priorities;

- Assist City staff with development of new strategies, objectives, priorities and programs for inclusion in the Consolidation Plan and Action Plan; and
- Develop and incorporate a performance measure component as required by HUD regulations.

1.3.10 Prepare a Housing Market Analysis and Needs Assessment:

Collect and analyze statistical information that provides an overall picture of the housing needs of the City. At a minimum, the assessment should include the following:

- Housing supply and demand;
- Housing affordability analysis;
- Cost-burdened households;
- Housing types;
- Housing conditions, including substandard units;
- Disproportionate racial/ethnic group housing needs;
- Specific housing objectives;
- Inventory of local, state and federal assisted housing;
- Barriers to affordable housing;
- Lead based paint hazards;
- Inventory of existing shelters, transitional housing and permanent housing for the homeless;
- Needs of sheltered and unsheltered homeless;
- Needs of subpopulations;
- Needs of persons threatened with homelessness;
- Special independent living needs and issues for persons with physical and mental disabilities;
- HIV/AIDS population housing needs; and
- Supportive service needs.

1.3.11 Identify non-housing community development needs, including:

- Economic development opportunities and workforce development needs;
- Public facilities and infrastructure improvements;
- Accessibility needs;
- Historic preservation needs;
- Economic development needs;
- Residential needs; and
- Service needs.

Planning needs:

- Public service needs; and

- Other community development needs.

1.3.12 Identify housing and community service gaps, including:

- Establishment of priority needs;
- Obstacles to meeting housing goals and objectives;
- Geographical areas: investigate the need for a targeted area implementation plan or targeted economic development area;
- Alleviation of overcrowding;
- Concentration of racial/ethnic minorities;
- Involuntary displacement;
- Affordable housing expansion strategy;
- Aging in place strategies for seniors in the community;
- Strategy to preserve affording housing stock;
- Anti-poverty strategy;
 - Community Level initiatives that maintain or improve education or cognitive development (GED or ESL programs)
- Programs to assist households with incomes below the poverty level;
- Coordination with other programs and agencies;
- Community development priority analysis and strategy; and
- Create or maintain employment opportunities within the low-income community.

1.3.13 Identify any other service gaps, including:

Public Services

- Social economic needs and service gaps:
 - Programs to improve the presence and availability of community services where low-income people live.
- Socioeconomic Disparities in the Community Analysis:
 - Income;
 - Capacity to acquire wealth;
 - Racial;
 - Education;
 - Access to health care;
 - Access to affordable housing;
 - Substance Abuse;
 - Aging Services;
 - Access to Public Transportation;
 - Strengths in the institutional structure;
 - Gaps in the institutional structure; and
 - Coordination and delivery services.

- 1.3.14 Analysis of the Collected Surveys. Consultant shall distribute surveys by mail or at community meetings and receive responses organized into a Microsoft Excel spreadsheet. In addition to the machine-readable responses, there will also be comments to open-ended questions.
- 1.3.15 Statistical Data Collection and Analysis. Using the most current, reliable and reasonably available federal, state and local data sources, locate, collect and analyze all demographic, economic and other data necessary to prepare the Con Plan.
- 1.3.16 Study Session Preparation and Presentation. Prepare and present appropriate materials for a study session with the Community Services Advisory Board (CSAB) and City Council on the Con Plan and related documents. A modified version will also be presented at the community meetings. Anticipate a minimum of one to two-hour attendance time for Council and CSAB.
- 1.3.17 Public Notices. Coordinate public notices with the City, in accordance with HUD regulations, announcing commencement of the 30-day public comment period for the draft Con Plan and AAP. City to be responsible to publish all notices.
- 1.3.19 Public Hearing Attendance. Attend the public hearing, respond to all questions, and take notes on all public comments for inclusion in the final documents. The above-referenced study session may or may not be held at the same meeting where the public hearing is held. Anticipate meeting attendance for a minimum of two hours.
- 1.3.20 Preparation and Reproduction of Final Draft Documents. Finalize the documents as necessary for the City to produce a final ConPlan in accordance with the contract timelines.
- 1.3.21 Prepare an Executive Summary for each document.
- 1.3.22 Prepare a timeline for project milestones including proposed community meetings and stakeholder interviews. This timeline will be made available to the public to explain the process.
- 1.3.23 Response to HUD as necessary. Respond, through City staff, to questions, concerns and requests for modification received from HUD. The Consultant will prepare and deliver to HUD, through City staff, appropriate responses to questions and concerns from HUD and will make all modifications to the Con Plan as required by HUD.

1.3.24 Preparation, Reproduction of Final Document. Revise the final draft to reflect any changes made by City Council and/or HUD. Provide the City with an electronic file of the complete document formatted in Adobe PDF.

1.4 FY 2025 ANNUAL ACTION PLAN

1.4.1 Assist in preparing the City's FY 2025 Annual Action Plan that includes first year funding goals, priorities and strategies, along with proposed accomplishments and performance measurements as outline in the ConPlan. The City is responsible for submitting the AAP in the eCon Planning Suite in IDIS. The AAP should illustrate specific uses of the first year's funding under the ConPlan.

1.4.2 The Consultant must include all required maps, tables, charts, illustrations, and photographs needed to comply with 24 CFR Part 91. The draft AAP for the public must be in a Word Document that is easily readable. The Consultant must provide internal copies of plan section to City staff for review and comment before public draft or plan is finalized.

1.4.3 Draft Annual Action Plan Preparation. Prepare an electronic draft of the Annual Action Plan for City staff to review prior to public distribution. The timeline will be established at the beginning of the process. The draft AAP will be updated after separate public meetings held before the CSAB and City Council, and after each of the four public hearings.

1.4.4 Public Notices. The Consultant will prepare the public notices for the public meeting and 30-day comment period.

1.4.5 Preparation, Reproduction of the Final Document. Revise the final draft to reflect any changes made by City Council and/or HUD. Provide the City with an electronic file of the complete document formatted in Adobe PDF.

1.4.6 Response to HUD through City staff. Respond to all questions, concerns and requests for modification received from HUD. The Consultant will prepare and deliver to HUD, via City staff, appropriate responses to questions and concerns from HUD and will make all modifications to the document as required by HUD.

1.5 ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE

- 1.5.1 Prepare an update to the Analysis of Impediments to Fair Housing Choice (AI) pursuant to federal laws, regulations and guidelines covering areas of Tacoma, Lakewood, and greater-Pierce County. The AI must be fully compliant with the requirements of the Housing and Community Development Act of 1974, as amended, and the National Affordable Housing Act of 1990, as amended.

The AI will be prepared in accordance with HUD's AFFH notice of Proposed Rulemaking, dated February 9, 2023, and subsequent Final Rule. The AI will provide an introduction and executive summary of the analysis, jurisdictional background data, an evaluation of the jurisdictions' current fair housing legal status, an identification of impediments of fair housing choice in the public and private sector, an assessment of current public and private fair housing programs and activities within the jurisdiction, and conclusions and recommendations for corrective actions to address identified impediments.

In preparing the AI Update, the following tasks are expected to be completed as part of the Scope of Work, at a minimum:

- 1.5.2 A review of impediments to fair housing choice in the public and private sector that involves:
- A comprehensive review of the jurisdictions laws, regulations, and administrative policies, procedures, and practices;
 - An assessment of how those laws, etc. affect the location, availability, and accessibility of housing;
 - An assessment of conditions, both public and private, affecting fair housing choice for all protected classes; and
 - An assessment of the availability of affordable, accessible housing in a range of units sizes.
- 1.5.3 The review and assessment must include, at a minimum:
- Examination of pertinent data regarding demographics, income, employment, and housing, as well as studies that have been completed related to fair housing and access to housing;
 - Examination of data regarding the nature and extent of fair housing complaints and suits; fair housing testing conducted, if any, and results; results of Fair Housing Initiative Program (FHIP) grants, if any; and other data that may evidence achievement of Fair Housing Choice within the jurisdiction;

- Review of the 2020 update of the City of Lakewood and City of Tacoma AI documents;
- Review of prior and current activities that promote fair housing, including an assessment of agencies currently providing fair housing programs in the area;
- Examination of private market issues that relate to the sale or rental of housing, the provision of brokerage services, mortgage lending, insurance sales and underwriting, HOME Mortgage Disclosure Act (HMDA) data, Community Reinvestment Act (CRA) data, property appraisal and property management;
- Evaluation of public notices and practices which affect the provision of fair housing including, but not limited to public services; state and local laws, ordinances, and regulations; planning and zoning laws and decisions; land use regulations; housing and community development funding policies and practices; and property tax policies including, but not limited to tax exemptions; and
- As part of the evaluation of public policies and practices which affect the provision of fair housing choice, a review of citing of group homes and compliance with Fair Housing Act accessibility requirements for the new construction of multi-family housing units in Consortium member jurisdictions.

1.5.4 Outreach to fair housing stakeholders and the general public to provide the opportunity to take part in the AI development process. Utilization of a consultant and input process that ensures inclusion of individuals and groups that represent protected classes and other diverse interests such as persons with disabilities, families with children, immigrants, homeless persons, racial and ethnic groups, civil rights commissions, organizations working with low-and moderate-income persons, tenant's rights organizations, legal service programs, NAACP, veterans organizations, public and private housing providers, fair housing organizations, local governments, banks and other financial institutions, others interested organizations and the general public. Various methods or combination of methods may be utilized as deemed appropriate.

1.5.5 As part of the consultation and input process, conduct community forums/public meetings in coordination with the Cities, as deemed necessary to complete the AI. Currently, the City is proposing a minimum of three community forums/public meetings to be held in different geographical areas of Lakewood. The Consultant will be responsible for inviting participants, preparing agendas, handouts and other presentation materials, as appropriate, as well as maintaining

transcripts and minutes of the forums/meetings and citizen comments/input received.

- 1.5.6 Based on the review conducted, identify impediments for fair housing choice for the City, listed in order or priority with proposed methods of corrective actions to address identified impediments. Where feasible and practicable, identify areas where impediments are most prevalent in order to assist the City in targeting its efforts.
- 1.5.7 Work cooperatively with local governments, individuals, and groups in preparing the AI.
- 1.5.8 Keep documentation of information gathered for the AI and the methodology used, a list of individuals and groups participating in the development of the AI, and record of outreach consultation/input activities conducted and comments/inputs received.
- 1.5.9 Provide periodic progress updates to the City, as requested.
- 1.5.10 Provide a draft of the AI report in progress for review and comment by the City prior to submission of the final document. This is a firm deadline project document; we must have a draft document for public comment completed by March 30, 2025, and a completed document submitted to HUD no later than May 15, 2025. A final draft AI document shall be provided to the Cities in electronic form no later than March 10, 2025.
- 1.5.11 Provide a list of individuals and groups participating in the development of the AI and a record of outreach consultant/input activities and comments/inputs received to the City. For the forums/meetings, provide a copy of agendas, meeting materials, and comments/inputs received.
- 1.5.12 Provide an electronic copy of the final AI to the City upon completion.

1.6 CONSULTANT QUALIFICATIONS

The following lists the minimum qualification requirements of the Respondent(s):

- 1.6.1 Provide documented evidence of at least five years of experience providing similar consulting services in producing a ConPlan defined by HUD

for an entitlement community receiving CDBG, HOME, and related funds and related documents.

1.6.2 Provide at least 3 references of clients currently/previously served; at least one of the references to be a city, county or state entity.

1.6.3 Provide documentary evidence of experience with and proficiency in HUD's web-based eCon Planning Suite.

1.6.4 Documented knowledge of:

- CDBG and HOME regulations;
- Consolidated Plan regulations;
- Urban planning principles;
- Methods of data collection, analysis and summarization (in narrative and graphic formats);
- Various housing and community development resources and governmental agencies; and
- Analysis of Impediments to Fair Housing Choice.

1.7 CITY STAFF PARTICIPATION

1.7.1 The City expects the Consultant to have the capacity to exercise independent judgment and to perform those actions necessary to achieve the project objectives in a manner consistent with those expected of senior technical and management staff. While the Consultant will be working under the general direction of the City's Housing Division Manager, it should be understood the City has limited professional staff capacity to support the project and will rely on the personnel, experience and expertise of the Consultant to ensure all necessary components of the process are completed in a timely manner.

1.8 SUBMITTAL REQUIREMENTS

1.8.1 SUMMARY OF FIRM AND STAFF. Describe the Consultant's resources, capabilities, and the number of years in business. Provide resumes of all personnel who will perform work under this Agreement. Indicate the number of years' experience they have in preparing a 5-Year Consolidated Plan, Annual Action Plan, and Analysis of Impediments to Fair Housing Choice. Provide the names, titles, experience and job duties of all subcontractors and the amount of time they will dedicate to the project. Present experience with HUD currently used systems, including but not limited to IDIS and the eCon Planning Suite required by HUD.

1.8.2 SUMMARY OF QUALIFICATIONS. Complete all the questions and submit all requested documentation to summarize Consultant's qualification.

1.8.3 TECHNICAL APPROACH. Describe Consultant's understanding and approach to this project as defined within the RFP. Describe the methods used by the firm to ensure accuracy and coordination of tasks requested within the scope.

1.8.4 TIMELINE. Please provide an expected time commitment, milestones and completion dates, if different from City timeline.

1.8.5 COST. Present detailed information on the firm's proposed fee schedule for the work specifications and for any variation for non-routine services, inclusive of Washington State sales tax and any other applicable government charges. Please provide specifics as to definitions of routine versus non-routine tasks, what is fixed as opposed to variable, and how costs are adjusted according to that classification. Please also treat the ConPlan, AI, and outreach activities as individual line items and provide a specific break out of costs for each.

Payment by the City for the aforementioned services will only be made after the services have been performed, an itemized billing statement is submitted in a form specified by the City and approved by the appropriate representatives, which shall specifically set forth the services performed. Payment will be made in accordance with the payable payment cycles based upon a signed Consultant agreement with the City.