

Aug 14, 2012

**REQUEST FOR PROPOSAL**  
**HOUSING NEEDS ASSESSMENT**

Enclosed is a Request for Proposal (RFP) for a Housing Needs Assessment. The Town of Breckenridge, Colorado, is sponsoring the RFP.

Proposals should be submitted to:

Laurie Best-Community Development Department  
Town of Breckenridge  
150 Ski Hill Road  
PO Box 168  
Breckenridge, CO 80424

Submittal Deadline:

Proposals should be received no later than September 10, 2012 at 3 p.m. MST. Any proposal received after that time shall not be considered, and shall be returned unopened to the proposer. Electronic or fax submittals shall not be considered. Procedural and technical questions are to be submitted in writing to Laurie Best, Project Manager, at [laurieb@townofbreckenridge.com](mailto:laurieb@townofbreckenridge.com).

To be considered, individuals are required to adhere to the following schedule for this procurement:

Deadline for questions	Monday August 24, 2012	5:00 p.m.
Proposals Due	Friday September 10, 2012	3:00 p.m.

Sincerely,

Laurie Best  
Project Manager  
Town of Breckenridge

**Summit County and Town of Breckenridge  
Housing Needs Assessment  
Scope of Services  
August 2012**

**INTRODUCTION:**

The Town of Breckenridge, in conjunction with other Summit County communities, is requesting proposals for a Workforce Housing Needs Assessment for Summit County. Our goal is to obtain updated information about the amount, type (rental or for sale), size, location, and price of housing required to meet the current and future needs of County residents and employees. The Assessment will be used to establish housing strategies, workforce housing policies, and to evaluate potential housing development (s) that are intended to serve the needs of the Summit County workforce. The Town desires to retain a qualified Consultant who is experienced in workforce housing issues, particularly in resort communities.

In addition to the Summit County Assessment, the Consultant is also asked to provide another proposal for an Assessment that is specific only to Breckenridge/Upper Blue Basin. The two proposals will be reviewed and we will decide whether to move forward with the County-wide Assessment or the Breckenridge/Upper Blue Basin Assessment.

**BACKGROUND AND GOALS:**

Summit County is centrally located in the Colorado Rockies. It is easily accessible from the Denver metro which is approximately 80 miles to the east. Included within the County are six municipalities (Blue River, Breckenridge, Dillon, Frisco, Montezuma, and Silverthorne), four major ski resorts (Arapahoe Basin, Breckenridge, Copper Mountain, and Keystone), and a significant amount of public land including National Forest and Wilderness areas. The County is a popular vacation and recreation destination with a permanent resident population of approximately 28,000. The State Demographer anticipates the resident population to increase up to 49,267 residents by the year 2030. The current population distribution is as follows:

- Breckenridge 4,540
- Frisco 2,683
- Silverthorne 3,887
- Dillon 904
- Blue River 849
- Unincorporated Areas\* 15,066

\*(includes Keystone, Montezuma, Copper Mountain, Summit Cove, Heeney)

For planning purposes, the County is divided into four distinct basins that are defined by natural features including the Blue River, the Snake River, and the Ten Mile Mountain

Range. The planning basins are the Upper Blue River Basin (Breckenridge and Blue River), the Lower Blue River Basin (Silverthorne and Heeney), the Ten Mile Basin (Frisco and Copper Mountain), and the Snake River Basin (Keystone, Montezuma, Summit Cove, Dillon). The County-wide Assessment must include current and future needs/target projections for each Basins as well as the County as a whole.

Historically, the County was a mining and agricultural community, but tourism and recreation, and related real estate and construction jobs have dominated the economy since the 1960s. With the development of the four ski resorts and the easy access to and from Denver, the County has transformed into one of the Country's best-known and premier recreation and vacation destinations. As part of this transformation the majority of the housing in Summit County has been developed to meet the needs of visitors and part time residents, and only a small percentage of the homes are occupied by year round residents (local workforce and retirees). The housing that tends to serve the workforce includes older condominiums and older homes along with newer subsidized 'for sale' and rental units. As with most resort communities, the cost of living and the cost of real estate are high, especially relative to local wages. This results in overcrowding and cost burdened households. With limited affordable housing options many employees commute to their jobs from outside the County and from one Basin to another.

It is the goal of the local communities to limit the 'down valley' trend and to insure that there are opportunities for employees to live in the Basin where they are employed. Affordable housing is viewed as an important public policy because businesses and the resort economy rely on the labor force to thrive. A critical mass of employees and their families, who are vested in the community and live full time in a community, promotes diversity, and sustains the real town character that is valued in Summit County. Additionally, negative impacts associated with commuting such as traffic, congestion, worker productivity issues, transportation costs, time away from family, and absenteeism can be reduced when employees live near their jobs. Finally, when housing is affordable, families are better able to cover other important expenses such as education, health care, food, childcare, insurance, etc. The communities would like to insure that there are affordable options for all employees who would choose to live near their jobs and the Town of Breckenridge has establish a goal that 47% of the employees working in the Town/Upper Blue also live in the Town/Upper Blue.

The issue of workforce housing becomes increasingly important as the County approaches buildout and there are fewer sites for housing development. Even with the recent recession much of the real estate is unaffordable to lower and middle income households. There are concerns that the changing demographics, including the aging population, in-migration of retirees, and local workers retiring, will impact the amount of housing that is available and affordable to the workforce, especially as the communities approach buildout. In 2007 voters in Summit County approved an impact fee and a sales tax for Affordable Housing that is projected to generate approximately \$30 million by the time it expires in 2017. This revenue is used to support the Summit Combined Housing

Authority (SCHA) and a variety of housing programs and development. To develop the most effective policies and programs, the Towns, the County, and the SCHA need to know the current housing needs and the future housing needs, and where the market is not addressing those needs. The Towns, the County, and the SCHA will also utilize the Needs Assessment to evaluate strategies related to the expiration of the impact fee/sales tax. Both the County and the Town have commissioned Needs Assessments before and the Consultant is encouraged to familiarize themselves with these reports and utilize as much of the information that has previously collected as possible. The new information may be presented as an update to previous Needs Assessments. However, the Consultant should be advised that local conditions have changed since previous Needs Assessments were developed. The changes include lower interest rates, some real estate depreciation, some job loss, and some new subsidized housing that has subsequently been developed.

Relevant Past Studies:

- Summit County Housing Needs Assessment-2001
- Upper Blue Housing Needs Assessment-2003
- Summit County Needs Assessment-2005
- Breckenridge Housing Needs Assessment-2006
- Breckenridge Vision Plan-2002
- Breck Workforce Housing Action Plan-2008
- Summit County Comprehensive Plan-2009
- Upper Blue Master Plan-2010

**CONSULTANT’S ROLE AND SCOPE OF SERVICES:**

The Town desires the Consultant to develop a Workforce Housing Needs Assessment (or an Update to the most current Needs Assessment) that includes an estimate of the existing need for housing and the future need for housing. The goal is to identify specifically where and how the housing market is not meeting the current and future needs of residents and workforce in terms of product, location, and pricing. The future need for housing should include long term projections for the next 20 years in 5 year increments. The Needs Assessment should include a description of the methodology used and rationale behind all assumptions that are used. The Needs Assessment should also describe how the projections take into account the many variables that affect workforce housing demand, supply, and affordability, including but not limited to:

- Population and demographic trends
- Wages and household income
- Jobs and employment forecasts
- Lending practices and interest rates
- Seasonality of jobs
- Local housing market trends

- Local housing stock ( price, appreciation, affordability, age, condition)
- Impacts of baby boomers, second homes owners, and vacation homes
- Loss of current employee units
- Distribution of jobs and housing throughout the County and issues of fair share of housing (over concentration of income levels, equitable mix, etc.)
- Commuting patterns

The Assessment should be specific enough so it can be utilize to develop public policies and to also plan for and evaluate new housing projects. The Assessment should describe how (and when) the Assessment will need to be updated so it remains relevant over time. All assumptions, as well as the rational for the Consultants methodology, must be fully explained within the Assessment.

**Any suggestions regarding alternatives or additions to this scope of services are welcome.**

#### REQUIRED DELIVERABLES:

The Consultant will present a draft Needs Assessment at a meeting of the Town Council and/or mayors and managers. Based upon feedback and direction, the Consultant will modify the draft and complete the final Housing Needs Assessment.

The final product shall be an electronic product. The Consultant will provide the Town with this electronic file.

The Housing Needs Assessment should be suitable for distribution among the citizens and business community. The Consultant will present the final Housing Needs Assessment at a public meeting.

#### TIMELINE:

The timeline is flexible depending on the Consultants proposal and methodology, however the Town estimates that the final Needs Assessment should be completed this Fall.

#### PROPOSALS:

The following information should be included in the proposal for both the County-wide Needs Assessment and the Breckenridge/Upper Blue Needs Assessment:

- Provide examples of your team’s prior experience in Housing Needs Assessments and the results of recommendations made.
- Outline, in sufficient detail, the methods for identifying the Housing Needs and a proposed outline of the contents of the Housing Needs Assessment.

- Identify the project manager and all team member(s) responsible for completing tasks. Include their resumes, areas of expertise, and hourly rates. Identify any tasks for which the Town will be responsible.
- Specify the time, resources, and costs required to complete the Breckenridge/Upper Blue Needs Assessment and the County-wide Needs Assessment. The cost of the County-wide Needs Assessment should also be broken down by Basin.
- Include a total timeline and total cost for the entire project with each task clearly identified in the timeline.
- Describe quality control procedures, scheduling, and cost control methods to be utilized to ensure delivery of contracted services.
- Provide a financial statement that indicates the ability of the lead entity to complete this project. Please include any other projects that the team is working on.

The proposal should also include a summary from the Consultant that describes any significant differences in the methodology that would be used for a County-wide Assessment versus a Breckenridge/Upper Blue Basin Assessment. The goal is to understand if there are different data sources or if the geographic scope of the project impacts the nature of the results.

The total length of the proposal should not exceed 25 single-sided pages. The proposal must be submitted electronically as one complete PDF.

The Consultant should be aware of the potential for new tasks to be added to the scope of services both before and after the process gets underway. Any tasks added by the Town will be negotiated with the Consultant.

Proposals should be received by 3 p.m. MST, Sept 10, 2012. Submit proposals to:

Laurie Best  
Town of Breckenridge  
150 Ski Hill Road  
PO Box 168  
Breckenridge, CO 80424

The Town reserves the right to reject any and all proposals at its sole discretion.

For questions contact:

Laurie Best  
Phone: 970-547-3112  
Email: laurieb@townofbreckenridge.com

The Town will not pay costs incurred by the applicants associated with responding to this RFP. The Town reserves the right to cancel this RFP process at its discretion.