



Department of Planning & Development

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Madison Municipal Building  
215 Martin Luther King, Jr. Boulevard  
Madison, Wisconsin 53701-2985

TO: Persons and Groups Interested in Affordable Housing and Zoning Policies  
FROM: Mark A. Olinger, Director, Department of Planning and Development  
SUBJECT: Request for Proposals for a Study of Madison Housing Needs and Homebuyer and Renter Perceptions of Inclusionary Zoning  
DATE: September 8, 2006

For the last several years, the City of Madison has worked with developers, neighborhood groups, and residents to increase the supply of affordable housing and promote economically integrated neighborhoods.

The City recently adopted a revised Inclusionary Zoning Ordinance<sup>1</sup> that includes some changes to enhance the terms for target users of inclusionary units, and streamline the approval process for developers. During the Council discussion of the Ordinance changes, some questions were raised concerning housing needs within the community, and how the City might better help potential participant households looking for housing. The City has now appointed an Inclusionary Zoning Advisory Oversight Committee to further refine the program and make it more effective.

In order to proceed, the Committee is interested in hiring a consultant group to explore several dimensions of the program:

- a) What are the housing needs of the target population?
- b) What are the demographics and housing-related behavioral patterns of the target population?
- c) How do potential homebuyers and renters perceive the inclusionary zoning program?

If you are interested in working with the City, please review this request and submit a proposal; if you know of some other groups who may be interested and helpful in developing a strategy, please pass this RFP along to them.

We appreciated your previous interest in this area, and we hope that as we develop a more effective program, you will be interested in working with us to achieve those goals.

If you have specific questions about this proposal, please contact Hickory Hurie at [hhurie@cityofmadison.com](mailto:hhurie@cityofmadison.com), Barb Constans at [bconstans@cityofmadison.com](mailto:bconstans@cityofmadison.com), or Brad Murphy at [bmurphy@cityofmadison.com](mailto:bmurphy@cityofmadison.com).

The deadline for submission is Friday, September 29, at 4:00 PM.

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<sup>1</sup> The website address of the revised ordinance is [http://www.cityofmadison.com/cdbg/iz/general/iz\\_ordinance.pdf](http://www.cityofmadison.com/cdbg/iz/general/iz_ordinance.pdf).



## HOUSING NEEDS AND HOMEBUYER/RENTER PERCEPTION STUDY REQUEST FOR PROPOSALS

**PROPOSALS DUE: 4: 00 PM, Friday, September 29, 2006**

### **Purpose**

The City of Madison Department of Planning and Development is seeking proposals from qualified consultants to assist a committee of elected officials and housing and neighborhood representatives explore housing needs within Madison and perceptions of the market and program by potential homebuyer and renter participants in the inclusionary zoning program. The objective of this study is to help the Inclusionary Zoning Advisory Oversight Committee refine its policies and strengthen City efforts to help moderate-income households secure housing within the City as one strategy to promote more economically integrated neighborhoods.

The City envisions a multi-step process, with the first phase focused upon analysis of market conditions, housing demand for both rental and owner-occupied housing, and research on target population perceptions, and a second, later phase focused upon specific marketing and promotion strategies for the Inclusionary Zoning program. This RFP is for the first phase of this multi-step process.

### **Project Scope**

Listed below are major elements that we anticipate will be included in submitted proposals. It is the intent of this Request for Proposals to elicit all productive ideas and approaches that will facilitate the project objectives, whether explicitly outlined in this RFP or not.

#### Element I:

- Market analysis of the housing needs<sup>2</sup> of families with incomes below the area median income, and the nature of the housing available or likely to be available. The proposed study should include data on both the rental and owner-occupied housing markets for Dane County, with a separate breakout of data for Madison. In addition the analysis should provide a separate breakout of data for the Madison target population households listed in the inclusionary zoning ordinance (buyers equal to or less than 80% of the area median income, and renters equal to or less than 60% of area median income).

#### Element II:

- Perceptions of the potential buyers and renters of inclusionary units regarding their housing goals, purchase or renting power, the housing search process, and attributes of an inclusionary zoning program that would assist or hamper their efforts to secure housing. It is presumed that two or three focus groups will be held with income-eligible buyers.

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<sup>2</sup> The City ordinance uses a definition of housing costs that include utilities within the housing costs of rental households and condominium or resident association fees within the housing costs of homebuyers.

The City expects the consultant proposal to include a minimum of three meetings with a City project team (composed of City staff and Oversight Committee members) as part of the proposal:

1. an initial scoping meeting;
2. a meeting to review market data and trends and to examine the research concerning target population perceptions; and
3. a meeting to present the final report product to the Inclusionary Zoning Advisory Oversight Committee.

Timeline for completion of this project is December 30, 2006.

The consultant will serve as an independent agent for the City of Madison.

### **Proposal Submission and Selection**

Completed proposals should include the following information:

1. Name and address of firm (and subcontractors if proposed).
2. A summary of your firm's qualifications and experience as it relates to the project scope.
3. A description of the experience and qualifications of the person(s) who will be assigned to this project and their position within the organization. Please identify your firm's official contact for the City on this project. If you propose to work in partnership with another firm, include a description of their experience and qualifications as well.
4. A description of the proposed methods and procedures to be employed, including a timeline for project implementation and meetings with the City project team.
5. The City's preference is to hire one consultant, although that consultant may partner with others. A fixed fee proposal should be provided for the services outlined, including a delineation of costs for each element, and method for payment. A "Rate Sheet" should be included that outlines potential project staff salaries, per diem expenses, and other reimbursables related to these activities. This rate sheet should be current for at least 9 months from issuance.

Proposals will be reviewed by City project team composed of City staff and IZ Advisory Oversight Committee members with the final selection of a contractor to be approved by the Mayor. Evaluation of proposals will be based upon the following criteria:

1. Responsiveness of the proposal to the objectives identified in the RFP's "Purpose" and "Project Scope."
2. Reasonable and competitive cost of the proposal.
3. The feasibility and timeliness of the proposal.
4. Consultant's demonstrated capacity to implement and complete the proposal as submitted.

The Community Development Office is accepting written proposals through 4:00 PM, Friday, September 29, 2006. All proposals must be received in the CD Office by 4:00 PM on this date in order to be considered. Fifteen (15) complete copies of the proposal are to be submitted to the CD Office, 215 Martin Luther King, Jr. Boulevard, Room 280, P.O. Box 2985, Madison, WI 53701-2985, Attention: Hickory Hurie.

The City reserves the right to further negotiate the scope of elements, work products, timing, award amount and budget items with the selected applicant group prior to entering into an agreement. All work products and reports shall be the property of the City of Madison.

Requests for assistance or questions concerning the request for proposals may be directed to Hickory Hurie, Community Development Office, Department of Planning and Development, City of Madison, (608) 267-0740, [hhurie@cityofmadison.com](mailto:hhurie@cityofmadison.com), Barbara Constans, CD Office, Department of Planning and Development, City of Madison, (608) 267-0740, [bconstans@cityofmadison.com](mailto:bconstans@cityofmadison.com), or Brad Murphy, Planning Unit, Department of Planning and Development, City of Madison, (608) 258-6558, [bmurphy@cityofmadison.com](mailto:bmurphy@cityofmadison.com).

Enclosures:

City Professional Services Contract Agreement Format, found on the City's website at <http://www.cityofmadison.com/attorney/contract-pos.dot>

Overview of Madison Inclusionary Zoning Program, found on the City's website at <http://www.cityofmadison.com/cdbg/iz/>

Evaluation Report of program's first 12 months and Revised Ordinance, found on the City's website at [http://www.cityofmadison.com/cdbg/iz/general/eval\\_rept\\_2006-01-19.pdf](http://www.cityofmadison.com/cdbg/iz/general/eval_rept_2006-01-19.pdf)