



REQUEST FOR PROPOSAL

HOUSING NEEDS STUDY

July 14, 2023

PURPOSE:

Prince Edward-Lennox & Addington Social Services (PELASS), is inviting proposals from professional and experienced proponents eligible to develop a Housing Needs Study.

GENERAL INSTRUCTIONS:

Contact Person: Contact Person Scott Robertson
Email: srobertson@lennox-addington.on.ca
Contact Number: 613.354.0957 x 2203

Submission Deadline: **August 21, 2023 at 3:00pm**

Submission Address: Prince Edward – Lennox & Addington Social Services
95 Advance Ave
Napanee, ON
K7R 3Y5
Attention: Scott Robertson

Number of copies: Four (4) completed original proposals in a sealed envelope.

Proponent Details: Legal Name / Company Name
Address
Contact Person
Contact Email ID
Contact Phone Number
Submission Date and Signature

1. INTRODUCTION

The County of Lennox & Addington is the Service Manager for social services in the counties of Lennox & Addington & Prince Edward. The Prince Edward-Lennox & Addington Social Services Committee (PELASS) is the governing body which oversees the operation of social services. PELASS owns and operates 421 units of senior, single and family units across 16 properties and supports an additional 233 housing units managed by non-profit housing providers in Prince Edward and Lennox & Addington counties. PELASS also has 159 rent supplement units. The housing units are of different size and dwelling type, ranging from one bedroom to family units of 3-4 bedroom within apartment buildings, row houses, duplexes and single family homes.

PELASS is soliciting innovative proposals from consulting teams to assist with the creation of a housing needs study. The findings of this work are expected to provide PELASS with an improved understanding of the current and future housing needs across the entire service area (Lennox & Addington County and Prince Edward County). While the need for all housing types will be part of this study, there will also be a focus on affordable housing.

The expectation of this study is that it will be completed over 6 months and will include detailed population and housing forecasts, socio-economic breakdowns, modelling options for types of dwellings (single-family, duplex, and multi-unit), funding opportunities to create more affordable housing and a comprehensive review of all available surplus and under-utilized land within the service area.

One particular purpose of this strategy is to better understand the current gaps with respect to affordable housing, and to generate a formal inventory of properties to support future requests for proposals, maximizing the number of new affordable units and required funding.

PELASS is also interested in financial modelling to determine costs and contribution requirements to build and operate proposed properties. This would include determining the best funding opportunities, any opportunities to leverage existing assets, financing options and the best fit for PELASS. For example, CMHC's National Housing Co-Investment Funding is a funding stream that may be available to Service Managers to assist them to develop new affordable housing. We would like to know how much funding a project could receive through the Co-Investment Fund, abilities and limitations of this funding, the remaining funds needed and strategies to acquire these funds. We would like similar reviews of other funding opportunities.

The study will cover the entire service area and will have subsets of information broken down The Town of Greater Napanee, Loyalist Township, Stone Mills Township, Addington-Highlands Township and Prince Edward County.

2. GUIDING PRINCIPLES

In drafting the Housing Needs Study, the following must be considered as part of the development of the Study.

A. National Housing Strategy

National Housing Strategy includes provisions of a wide range of methods to create new affordable housing, support people experiencing homelessness and to reduce homelessness in the community. The Housing Needs Study must be aligned with the National Housing Strategy.

B. Service Level Requirements

The Housing Needs Study must ensure maintenance of the mandatory service level standards of Rent Geared to Income (RGI) housing and any other Provincial and Federal requirements.

C. Community component/interest

The Housing Needs Study must consider the housing needs of the communities served by PELASS, including an open house in each County to review the draft plan and seek feedback.

3. KEY ELEMENTS OF THE PROJECT

PELASS owns and manages 421 local housing corporation housing units and supports 159 rent supplement units, 11 transitional homes for homeless people, 233 non-profit housing units and has 1,009 households on our waiting list for subsidized housing.

The housing landscape in PELASS has changed rapidly over the past number of years. With low vacancy rates and rising prices, housing affordability is affected as is the availability of housing. The trends that are leading to this housing shortfall are demographic shifts of an aging population, tourism and urban settlement, rapidly increasing property values and rents, and the rise of short term accommodations. PELASS has seen a shift where there are numerous occurrences of unaffordable rents and home ownership, a decrease in the number of affordable housing units available and a rapid increase in homelessness.

PELASS is looking for a Housing Needs Study to help shape plans to create new affordable housing in the PELASS area. We are looking for a holistic viewpoint of the community's needs as well as potential obstacles and solutions, including social services and housing factors.

1. Deliverables

The expected deliverables for this project are a Housing Needs Assessment, Community Consultation to support the Needs Assessment and Housing Strategies and Financial Modeling.

This will be accomplished using verifiable data to estimate the quantity, location and type of residential units required to meet the projected demand for housing.

This work will include the following analysis and deliverables:

1. Analysis of the demographic and socio-economic trends that will affect population changes in various age cohorts, that considers factors such as population growth, increasing costs to rent and enter or participate in homeownership, impact of short term accommodations and increases to PELASS' homeless population.
 - Deliverables: Population forecasts using 5-year age groups and 5-year time increments from 2023 to 2043, for the PELASS service area based on the census information by Statistics Canada. The population forecast should be broken down by four townships (The Town of Greater Napanee, Loyalist Township, Stone Mills Township and Addington-Highlands), and Prince Edward County, and by demographic characteristics (age, income, household composition, etc.) to the extent possible.
2. Analysis of the population trends that will affect the demand for different types of residential units, that considers factors such as population structure, household composition, housing propensity, and household incomes.
 - Deliverables: Household and residential unit forecasts for the PELASS area based on the census information by Statistics Canada, using annual time increments from 2023 to 2043. Housing demand should be broken down by the four townships in Lennox and Addington County (The Town of Greater Napanee, Loyalist Township, Stone Mills Township and Addington-Highlands), and Prince Edward County, and by type (single family, semi-detached, row house, apartment), and by ownership (owned or rented).

3. Analysis of the demand for affordable residential units by types that are unlikely to be met by the private sector, based on Government-supported housing relative to the anticipated private sector development within the 5 municipalities, if experiencing an unmet demand for residential units.
 - Deliverables: A forecast of affordable housing units by type for the PELASS service area based on the census information by Statistics Canada, and locations of existing affordable housing.

4. Analysis of an inventory of properties that have the potential for affordable and market housing development, including information about land required to meet the demand for affordable and market residential units. This would outline how much land would be required if the need was met through single-family residential only, multi-unit development only and an optimal mix of both.
 - Deliverables: A land map showing the land needed to accommodate the population growth in the PELASS area using annual time increments from 2023 to 2043. This map would account for the demand forecast for affordable and market residential units and includes an estimate of the gross and net amounts of land required for residential development.

5. Analysis of the potential supply of housing through current and planned housing development by the private sector in order to assess gaps between the supply and demand, based on consultation with the development community.
 - Deliverables: A forecast of housing units by community, type and ownership that are planned to be built by the private sector.

6. Community Consultation to obtain information and insights from the community on the housing needs within the service area and analysis of community feedback.
 - Deliverables: Add community context to the quantitative analysis to the Housing Needs Assessment

7. Analysis of financial feasibility to determine the amount of equity and financing required to build a development based on the building program and operating costs, and what funding opportunities to pursue.
 - Deliverables: A model designed to consider the long-term sustainability of a development and includes a breakdown of construction program costs, hard construction costs, recommended composition for depth of affordability (rent geared to income, affordable, market) and ongoing operating costs. This will include information about available funding streams and recommendations.

8. Analysis of various funding model options and recommendations about what models might be appropriate in different circumstances, and ideal strategies for ownership and management of new affordable housing.
 - Deliverables: A list of funding model options that will include government grants, leveraging of existing PELASS local housing corporation assets and other funding mechanisms. Identify optimal ownership models (private, PELASS, non-profit, combination of these) and optimal locations (rural/urban).

9. Final Report: The Project Management Team will review and provide comments on the draft results of the Assessment. Comments provided by the Project Management Team will be incorporated into a final report. The final report will clearly describe the methodologies used and will be accompanied by all supporting raw data. A standalone report that is written in plain language, and illustrated as necessary, will be provided along with the final report, for circulation to the public and stakeholder groups by PELASS. The bulletin will explain which types of residential units are currently in demand and forecasted to be in the demand in PELASS area and the abilities and effects of accommodating them in different configurations.

4. INFORMATION AVAILABLE

PELASS has a number of resourceful reports and documents that will be available to the successful proponent while preparing the Housing Needs Study. Some of the primary documents are the following:

- Housing and Homelessness Plan 2014 and all updates
- Housing Revitalization Plan
- Homelessness Action Plan
- 10 Year Capital Plan
- Financial statements for the non-profit housing corporations
- Centralized Waitlist List Data Report (Staff Document)
- Rent Supplements Summary (Staff Document)
- Affordable Housing Prices and Rent Tables

5. EVALUATION

Proposals will be evaluated using the scoring matrix below:

Item	Percentage
Understanding the project requirements	20%
Proposed approach and project work plan	30%
Demonstrated expertise of proponent	20%
Management of timelines	10%
Proposed pricing and terms	20%

6. QUESTIONS AND ERRORS/OMISSIONS

Proponents must send all the questions relating to the RFP by email to the official contact person

Contact Person: Scott Robertson

Email: srobertson@lennox-addington.on.ca

The County of Lennox & Addington shall not be held liable for any questions, errors or omissions in any part in this RFP. It is the respondent's responsibility to seek clarification of any matter that it considers to be unclear within the RFP document. Respondents may review the RFP, and direct questions or seek additional information in writing to the above contact person before **August 8, 2023**. PELASS will provide a written response to all respondents on or before **August 10, 2023**.

There will be no consideration of any claim after submission of the Proposal that there is a misunderstanding with respect to the conditions imposed by the RFP.

7. SUBMISSION DEADLINE

Sealed Proposals are to be submitted to Prince Edward – Lennox & Addington Social Services office, 95 Advance Avenue, Napanee, ON, K7R 3Y5 before **3:00PM on August 21, 2023**.

Proposals received after the closing will not be accepted and will be returned to the Proponent unopened.

8. INSTRUCTIONS TO PROPONENTS

8.1. Proposal submission

- The Proponent must submit Four (4) original copies in a sealed envelope before the submission deadline.
- The Proposal should be typed, it must contain original signatures of the Proponent, where required. It should include all requirements, as set out in **Section 10 “Mandatory Requirements to Include in Proposal”**.
- A Proposal must be submitted in a sealed envelope and clearly addressed to Prince Edward – Lennox & Addington Social Services office, 95 Advance Avenue, Napanee, ON, K7R 3Y5 and marked with the RFP title - **“PELASS RFP – Housing Needs Study”**

8.2. Addenda

It may be necessary for a variety of reasons to issue addenda that may include, but not be limited to:

- a) Correction to, or clarification of, the RFP;
- b) Extension of the Submission deadline;
- c) Retraction or cancellation of the RFP; or
- d) Response to Proponent’s questions.

Proponents must provide PELASS with company information, including contact name, contact title, mailing address, email address, and phone number, to be advised of addenda when issued or further information, and to be placed on the Distribution List.

Addenda will be emailed to the email address identified by the Proponent and posted online. Although PELASS will make every reasonable effort to ensure a Proponent receives all addenda issued, it is the Proponent's ultimate responsibility to ensure all addenda have been received and are reflected in their Proposal.

8.3. Adjustments to Proposal

Adjustments to a submitted proposal by telephone, email, or mail shall not be considered.

- **Request to Adjust a Proposal before Submission Deadline**

A proponent who has already submitted a proposal may make a request to adjust their proposal before the deadline. In order to make the adjustment, the already submitted proposal will:

- a) Be returned to the proponent for adjustment and re-submission before the submission deadline; or
- b) Be superseded by the proponent making another submission before the closing deadline.

The proposal contained in the envelope bearing the latest date and time shall be considered the intended proposal and any others shall be considered withdrawn and will be returned to the proponent.

- **Request to withdraw a Proposal before Submission Deadline**

A proponent who has already submitted a proposal can request to withdraw their proposal before the submission deadline. The request must be sent in writing, on the company letterhead and include contact information for verification. Authenticity of the request will be confirmed by PELASS. Proposals withdrawn under this procedure cannot be reinstated.

- **Request to withdraw a Proposal before Opening**

No request for withdrawal of a proposal shall be permitted after the submission deadline.

8.4. Proposal Evaluation

Proposals will be evaluated based on the requirements set out in **Section 10 “Mandatory Requirements to Include in Proposal”**.

9. GENERAL TERMS AND CONDITIONS

9.1. Contract

The successful proponent shall be notified that the proposal has been accepted on or about September 6, 2023. Where applicable, the contract will be delivered to the successful proponent.

The successful proponent shall have 15 days from the receipt of the contract documents to execute and return the same to PELASS. Failure to execute and return the contract within the specified time may result in legal action, the disqualification of the proponent from the future Solicitation, the award by PELASS to another Proponent and/or the issuance of a new RFP.

9.2. Certificate of Insurance

The successful Proponent must provide an insurance certificate within 15 days of being advised of the award. The insurance certificate to be provided to PELASS must be from an insurer licensed in Ontario.

The insurance must cover the following policies:

- Comprehensive general liability insurance on an occurrence basis for an amount not less than two million (\$2,000,000)
- Automobile liability insurance including all vehicles and commercial trailers owned or leased by the successful Proponent, for an amount not less than two million (\$2,000,000)

9.3. Accept/Reject

A proposal may be accepted in whole or in part. It is the intent of PELASS to recommend one (1) proponent. In the event that a favourable proposal does not exactly meet the requirements, PELASS reserves the right to enter into negotiations with the proponent to arrive at a mutually satisfactory arrangement with respect to any modifications to the proposal. Revised proposals will not be called for if only minor changes are contemplated.

9.4. Confidentiality

The successful Proponent agrees that all the information that it acquires knowledge of as a result of the work will be used and retained in accordance with provincial and federal laws and regulations governing the collection, use, retention, disclosure and disposal of such information. The successful Proponent shall not at any time before, during or after completion of the work, use or disclose of personal or confidential information communicated to it or acquired by it in the course of carrying out the work for any purpose other than the completion of work herein, in accordance with applicable laws or as specifically agreed in writing by PELASS.

10. MANDATORY REQUIREMENTS TO INCLUDE IN PROPOSAL

Proposals must address all mandatory requirements set out below.

- Completion of **Form: 1 “Acknowledgement & Signatures”**
- The proposed approach to the key elements of the project, indicating the consulting team members and their roles in the project.
- A proposed work schedule identifying key project tasks, milestones, deliverables and meetings.
- A time allocation matrix identifying the distribution of time and timelines for the project elements and the consulting team members.
- Resumes, including project experience, for the key consulting team members
- Four references to similar projects undertaken by the Proponent with contact information.

- A maximum upset budget to complete the project with disbursements and HST indicated separately

11. RFP Timetable

	Dates (Estimated)
Issue Date of RFP	July 14, 2023
Deadline for Questions	August 8, 2023
Deadline for Issuing Addenda	August 10, 2023
Submission Deadline	August 21, 2023 3:00pm
Anticipated award date by PELASS	September 6, 2023

FORM: 1 “ACKNOWLEDGEMENT & SIGNATURES”

I/WE ACKNOWLEDGE that this Proposal is made without any connection, knowledge, comparison of figures or arrangements with any other company, firm or person making a Proposal for the same Work and is in all respects fair and without collusion or fraud.

I/WE ACKNOWLEDGE that all matters stated in the said Proposal are in all respects true.

I/WE ACKNOWLEDGE that, having read The Housing Needs Study Request for Proposals, I/WE have satisfied ourselves as to the terms, conditions, and specifications and do hereby submit a Proposal for, and offer to enter into a Contract with PELASS to develop the *Housing Needs Study*.

I/WE ACKNOWLEDGE that acceptance of this Proposal and the issuance of a Letter of Agreement shall be considered a binding contract upon both parties. It is agreed that the terms and conditions and any representations made in reference to this Proposal shall be incorporated in a Contract to be executed by the parties once PELASS has formally accepted the Proposal.

Dated at _____ this ____ day of _____ 2023.

Signature Name

Company Name: _____

Address: _____

Contact Person: _____

Phone number: _____ Email: _____