



San Juan County Request For Proposal

Housing and Community Needs Assessment

Proposal Issue Date:
August 2, 2023

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San Juan County Housing and Community Needs Assessment

1.0 Project Overview

Assess the needs, interests, desires, and skill sets of the households in San Juan County, as well as opportunities to stimulate community and economic development in the towns and adjacent communities. This is to be completed through new or expanded programs or businesses, the attraction of external funding and collaborative efforts to re-envision existing facilities, common areas, and other resources. Specifically, identify current residents' housing and employment needs along with those who would choose to relocate to San Juan County if adequate housing or job options were available.

1.1 San Juan County Overview

San Juan County is located in the southeastern corner of Utah and encompasses 7,820 square miles of mountains, arid mesas and canyons, and riverine environments, making it the largest county in Utah by square mileage. About 8% of the area is in private ownership with the balance managed by federal agencies, the State of Utah, the Ute Mountain Ute Tribe, and the Navajo Nation. Much of the tribal land is held in trust rather than owned by individuals. The county has numerous separate communities.

Community	General Location	Land Ownership
Aneth	South County	Navajo Nation
Blanding (Incorporated)	Central County	Private
Bluff (Incorporated)	South County	Private
Eastland-Ucolo	Central County	Private
Fry Canyon	South County	Federal Govt
Halchita	South County	Navajo Nation
Halls Crossing	South County	Federal Govt
La Sal	North County	Private
Mexican Hat	South County	Private
Montezuma Creek	South County	Navajo Nation

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Community	General Location	Land Ownership
Monticello (incorporated)	Central County	Private
Navajo Mountain	South County	Navajo Nation
Oljato-Monument Valley	South County	Navajo Nation
Spanish Valley	North County	Private and State
Tselakai Dezza	South County	Navajo Nation
White Mesa	Central County	Ute Mountain Ute Tribe

At the 2020 federal census slightly less than 15,000 people resided in the county, including 35% in the cities of Blanding and Monticello, with the balance in small communities and remote areas. Most of the population are American Indian/Alaska Native (47%) and non-Hispanic whites (43%), and approximately 56% of the residents are between 18-64 years of age. San Juan County has a median household income of \$52,400 and a median property value of \$128,700 according to the 2020 federal census. The poverty rate was 22.8%, with the greatest incidence in the southern portion of the county.

2.0 Project Goals

- a. Obtain data that will assist San Juan County and like communities in applying for funding sources to support affordable housing initiatives and community development.
- b. Define the specific housing needs of each area of San Juan County listed above, as well as areas in between. Also, define the current infrastructure and the needs for each of the areas within San Juan County.
- c. When defining current infrastructure needs, identify resources to support current population and projected growth.

3.0 Scope of Services

Task 1: Housing Initiatives

1. The Consultant will review existing documentation and plans, studies, efforts, organizations and programs relevant to the housing market in San Juan County.
2. The Consultant will identify sources of funding for housing and other related programs included in the current housing initiatives.

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3. The Consultant will review programs to identify redundancy, coordination and collaboration across multiple agency efforts.
4. The Consultant will meet and interview major stakeholders, including Indigenous Communities and Chapter Houses, to discuss San Juan County's housing needs and existing efforts. Members of the San Juan Affordable Housing Committee will facilitate the identification of key stakeholders and the compilation of data in the County.
5. The Consultant will collaborate with participating Indigenous Communities to identify the preferred process of developing land and housing in their communities.
6. The Consultant will synthesize the baseline inventory of current services and programs, private, nonprofit, and public operators and providers in the County.

Deliverable: The Consultant will provide a Baseline Housing Initiatives Report containing the information gathered in Task 1.

Task 2: Demographic, Geographic and Economic Data

1. Consultant will gather data for each community and county rural areas including, but not limited to, the number of residents, age and sex profiles, number of households and household size, number of persons employed per community and per household.
2. The Consultant will conduct population forecasting for San Juan County as a whole and for each of the communities.
3. The Consultant will examine poverty, homelessness, sensitive populations such as the elderly, disabled etc. and identify concentrated areas of poverty, characterize the impoverished population, and identify housing policies that may cause poverty to be present in these areas.

Deliverable: Using various collection methods, including but not limited to existing county data, Navajo Nation Housing Authority data, Navajo Nation Census data and the Woven Integrated Navajo Database (WIND), the Consultant will provide a report that will include, but is not limited to maps, graphics, charts or other relevant depictions of the information gathered in Task 2.

Task 3: Housing Stock, Trends and Projections

1. Consultant will review current housing inventory for each community and county rural areas and identify housing conditions, ownership, type of dwelling, if a rental unit whether it is short or long term, age of units, multi-family units, neighborhood character, available utilities (sewer, culinary water, electricity, telephone, cell service, internet), and access to health care facilities, grocery stores, gas stations, child care facilities, and the US Post Office.

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2. The Consultant will provide an inventory of existing subsidized housing, including availability, planned or anticipated subsidized housing and other dwellings which serve as transitional and emergency housing.
3. The Consultant will research proposed housing units, planned developments, and housing trends across San Juan County, and for each identified community.
4. Consultant will identify areas or zones, including agriculture and livestock areas in each community that are currently available for housing and map which of these areas/zones is not yet developed (vacant land) complete with evaluation of available utilities.
5. Consultant will review existing zoning or land use designations in the county and for each community where housing is allowed. Consultant will recommend and display on maps where a change in zone or land use designation would allow for housing expansion.

Deliverable: The Consultant will provide a report, zoning map or other document of summary of the existing housing inventory, projected housing trends and identified needs as gathered in Task 3.

Task 4: Market Analysis

1. The Consultant will summarize residential real estate trends of all types of housing including an analysis of residential sales, prices, length of time on the market, and other relevant real estate metrics before, during, and after the COVID-19 pandemic.
2. The Consultant shall include information from new residential units, types of building permits issued and trends across the County and in each community.
3. The analysis shall include the market rate for rental units in each community and availability of rental units in each community and county rural areas. Rental units will be described by type and kind (short or long term), number of bedrooms, square footage, presence or absence of kitchen and bath, location, and market rate.

Deliverable: The Consultant will provide a Market Analysis Report containing the information gathered in Task 4.

Task 5: Develop Implementation Strategies and Recommendations

1. The consultant will recommend the types or kinds of new housing units for each community and rural areas of the county that are needed to provide additional housing for existing and forecasted populations based off of the Market Analysis Report.
2. The Study will assess the condition of housing stock and provide recommendations for housing repair programs and/or approaches for housing restoration.
3. The Study will include recommendations to increase housing affordability and housing choices by considering job opportunities, education, strategies for employers, economic growth and access to services.

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4. The Consultant will identify sources of funding (federal, state, local and private resources) for technical assistance for housing and other related programs.
5. The final Study should include a summary with the recommended initiatives and impacts, as well as action steps for specific entities to implement and strategies for decision makers to use.
6. The Strategies and Recommendations must be congruent with current economic conditions.
7. The Study will include Recommendations for entitlements specific to land use.

Deliverable: The Consultant will provide a matrix with strategies for implementation identifying specific organizations with the capacity to implement action steps from information gathered in previous Tasks.

Task 6: Final Document and Presentation to Stakeholders

Deliverable: The Consultant shall provide 6 bound reports and 1 digital copy which includes the Housing Needs Assessment and Market Assessment Report, the Executive Summary, 1 digital copy of all GIS shape files and maps, and other presentation materials. All GIS data will need to meet standards of the Utah Geospatial Resource Center's Housing Unit Inventory per Utah Code 63A-16-5506.

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5.0 RFP Submission Requirements:

Proposals shall include the following information:

1. **Title Page:** List the RFP subject, the name of the firm, address, telephone number, name of contact person and the date.
2. **San Juan County RFP Form:** The County's Request for Proposal form completed and included as Page 1 in the proposal packet (Attachment A)
3. **Letter of Transmittal**
Make a positive commitment to perform the required work within the time period. Also give the name(s) of the person(s) who will be authorized to represent the firm, their title, and telephone number.
4. **Qualifications**
 1. Name, address and telephone number of the firm's owners, and full information about the corporate structure of the submitting firm.
 2. Location of the firm's primary place of business for legal purposes and any subsidiary offices, years of business, and types of services offered.
 3. Names and qualifications of personnel to be assigned to the project.
5. **Curriculum Vitae** of principal associates and key personnel proposed to have primary responsibility for the project.
6. **Provide a Project Timeline** including Schedule of Completion with expected timelines for each Task outlined within this RFP.
7. **Approach:** Indicate your understanding of the scope of work by describing your firm's approach, including specific illustrations of the procedures to be followed. Tell us about your firm's experience, background, staff capabilities, and examples of work, where your work will actually take place and why the County should hire your firm.
8. **Project History and References:** Provide references and project history for a minimum of two (2) projects from the consultant which meets similar minimum qualification requirements. These projects will be considered in evaluating the qualifications. The information must include:
 1. Project Name and Address
 2. Address and current telephone number for project owner, owner's project manager and/or owner's contact person on the project.
 3. Description of the project including:
 1. Type of project
 2. Initial project budget and final budget
 3. Describe community involvement within previous projects
 4. Project design and delivery method used

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9. Proposed contract fees shall be submitted containing a schedule of the estimated man-hours required and are to be broken down by type of personnel to be used for the proposed services.
 1. Breakdowns are to be shown separately for each item listed under "Scope of Work".
 2. Overhead factors and other multipliers shall be identified.
 3. The consultant shall be responsible for all required resources to include but not limited to computers, surveys, outside consultants, etc.
 4. Fee Schedule/Bid Form: A detailed fee schedule proposed to be charged for the services to be performed.

Proposals in non-standard formats cannot be evaluated without considerable analysis. Failure to follow the prescribed format may result in rejection of the proposal.

6.0 REQUEST FOR PROPOSAL POLICY:

Each Consultant who submits a proposal in response to this RFP agrees to comply with and be bound by San Juan County's Request for Proposals section within the San Juan County Purchasing policy that is in place at the time that this RFP was issued. Each Consultant may request and receive a copy of San Juan County's Request for Proposals policy by sending an email to Purchasing Agent and County Chief Administrative Officer Mack McDonald at mmcdonald@sanjuancounty.org or by visiting San Juan County's website located at <https://sanjuancounty.org/hr/page/san-juan-county-purchasing-policy>

7.0 EVALUATION PROCEDURE:

A. San Juan County will review and evaluate proposals based on the following factors:

1. Proposal's ability to meet the purpose and intent of the Study
2. Firm's experience with similar projects and experience of personnel assigned to this Study
3. Quality and completeness of past projects
4. Ability to complete all tasks within the proposed timeline
5. Presentation skills
6. Cost of services not to exceed price and cost effectiveness of proposal
7. Proposal is in the best interest of San Juan County

The evaluation scoring system is outlined in the table below.

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<u>Evaluation Criteria</u>			
<u>Primary Criteria</u>		<u>Primary Criteria % of Overall Evaluation Score</u>	
Qualification and Experience	<i>Sub-Criteria</i>	30%	<i>Sub-Criteria % of Primary Criteria Evaluation Score</i>
	<ul style="list-style-type: none"> ● Firm's experience with similar projects ● Quality of response to RFP connecting directly to related experience in completeness of past projects ● Experience of personnel assigned to this study. Cite relevant experience and credentials of assigned staff. 		<p style="text-align: center;">10%</p> <p style="text-align: center;">10%</p> <p style="text-align: center;">10%</p>
Technical Approach	<i>Sub-Criteria</i>	30%	<i>Sub-Criteria % of Primary Criteria Evaluation Score</i>

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	<ul style="list-style-type: none"> ● Scope of Work ● Detail of submitted work plan, schedule and proposed project approach 		15%
			15%
Fee Schedule	<i>Sub-Criteria</i>	30%	<i>Sub-Criteria % of Primary Criteria Evaluation Score</i>
	<ul style="list-style-type: none"> ● Cost of services not to exceed price and cost effectiveness of proposal ● Detailed Rate Schedule 		15%
			15%
Introduction	<i>Sub-Criteria</i>	10%	<i>Sub-Criteria % of Primary Criteria Evaluation Score</i>
	<ul style="list-style-type: none"> ● Consultant's ability to engage with the community and implement their feedback. ● Demonstrated experience working with Indigenous Communities using cultural sensitivity. 		5%
			5%

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8.0 PROJECTED SCHEDULE FOR THE RFP PROCESS:

The County reserves the right to modify this schedule at its sole discretion.

<u>Activity</u>	<u>Date</u>
Request for Proposal Issued	August 2, 2023
Initial Question and Answer Meeting	August 8, 2023
Last day to submit questions via email	August 16, 2023
Proposal Due Date	August 17, 2023
Notice of Award	September 5, 2023

9.0 QUESTION AND ANSWER VIRTUAL MEETING:

Interested firms wishing to submit a proposal are encouraged to attend a question, answer, and introduction virtual meeting hosted on google at the following video call link:

<https://meet.google.com/ryv-asdv-pxv> Or dial: (US) +1 802-487-0870 PIN: 925 325 170# on Tuesday, August 8th, at 4:00 PM MST. It is critical that interested parties are on time to the meeting. **This is the only date and time for a virtual face to face with County employees for the proposal.**

10.0 WRITTEN CONTRACT REQUIRED:

The selected party must be willing to enter into a written contract with San Juan County. A binding agreement between San Juan County and the selected party is dependent upon the negotiation, preparation, and execution of a formal contract. At any time prior to the execution of a binding agreement executed by both parties, San Juan County may, in its sole discretion, stop the selection process and decline to enter into an agreement for the subject matter herein.

11.0 INQUIRIES:

All inquiries relating to the specifications or proposal procedure should be directed in writing through e-mail to the Purchasing Agent, Mack McDonald at mmcdonald@sanjuancounty.org. The last day and time to submit questions will be 4:30 p.m. on August 16, 2023. **Please do not contact the agency, division, department, or other County officers or employees.**

12.0 REQUEST FOR FINAL AND BEST OFFERS:

Among other options at San Juan County's disposal, San Juan County may request a final and best offer at any time during the RFP process. If San Juan County exercises this option, the interested party shall respond prior to the deadline established by San Juan County when the

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option is exercised. If the interested party fails to timely provide a final and best offer, the best offer made by the interested party prior to the exercise of this option will be considered by San Juan County as the final offer of the interested party.

13.0 PROTESTS:

As further described in San Juan County's Request for Proposals policy, which is incorporated herein by this reference, any proposer who submitted a timely filed proposal that was not rejected by either the evaluation committee or the Purchasing Agent may file a protest. In order to be timely, a protest must be submitted, in writing, to the San Juan County Board of County Commissioners no later than six calendar days after the date that the *Notice of Award and Intent to Engage in Contract Negotiations* was sent by the Purchasing Agent to the applicable Consultant. Protests that are not submitted in a timely manner to the San Juan County Board of County Commissioners shall be rejected by San Juan County.

14.0 SAN JUAN COUNTY MAY TERMINATE THE RFP PROCESS OR DECIDE NOT TO ENTER INTO A CONTRACT

As further described in San Juan County's Request for Proposals policy, which is incorporated herein by this reference, San Juan County may terminate the RFP process regarding this RFP for any reason and at any time prior to the execution of a contract by a proposer and San Juan County regarding the services sought through this RFP. Moreover, San Juan County may decide not to enter into a contract with any proposer to provide the services sought through this RFP.

15.0 CONTRACT AND PROPOSAL INFORMATION

All proposers who submit a proposal in response to this RFP acknowledge that they have each read and understand this RFP and agree to be bound by the terms and provisions of this RFP, including, but not limited to, the following:

A. Firm Pricing: All prices, quotes, or proposals shall remain firm for the duration of the RFP process regarding this RFP and until a contract regarding this RFP is executed by San Juan County and a Vendor or San Juan County decides not to enter into a contract with any Vendor to provide the services sought through this RFP. A Vendor's failure to comply with this provision may result in the rejection of the Vendor's proposal.

B. Governing Law and Exclusive Jurisdiction and Venue: Any contract between San Juan County and a Vendor regarding this RFP will be interpreted, construed, and given effect according to the laws of the state of Utah and the ordinances of San Juan County, and the courts within San Juan County, Utah shall have the sole and exclusive jurisdiction and venue regarding any such contract. No contract will be assigned, in whole or in part, without the written consent of San Juan County.

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C. Licensing: The selected Vendor shall obtain all applicable federal, state, and local licenses before any contract between San Juan County and the Vendor regarding this RFP is executed. The selected Vendor must maintain for the duration of the contract between San Juan County and the Vendor regarding this RFP.

D. Registration: All Vendors shall be registered with the Utah State Division of Corporations and Commercial Code to perform business in the state of Utah. NOTE: Forms and information on registration may be obtained by calling (801) 530-4849, or toll free at 877-526-3994 or by accessing: www.commerce.utah.gov.

E. Public Domain: Interested Parties are advised that Utah law and San Juan County ordinances provide that, upon the full execution of a contract subsequent to an RFP, the contents of a selected proposal relating to this RFP may be placed in the public domain and become public records subject to examination by any interested parties in accordance to the Government Records Access Management Act (GRAMA), Utah Code Ann. 63G-2-101 et seq. and County ordinance. Please refer to Section XVI below for specific details regarding the protection of certain information.

F. Modifying or Withdrawing Proposals: Interested parties may modify or withdraw their proposals at any time prior to the proposal's due date. Interested parties may withdraw their proposals if San Juan County and the selected interested party cannot agree on contract terms.

G. Independent Contractors: Interested party agrees that if he/she/it enters into a contract with San Juan County, he/she/it will be an independent contractor and have no authority, express or implied, to bind San Juan County to any agreements, settlements, liability, or understanding whatsoever with any third party and will have no interest in any benefits provided by San Juan County to its employees.

H. Free and Competitive Bidding: Any agreement or collusion among prospective interested parties to fix a price or limit competition shall render the proposal void and such conduct shall be unlawful and subject to criminal sanction.

I. Insurance: If awarded the contract, an interested party will, at its sole cost and expense, secure and maintain both prior to the commencement of the term of the contract and for the duration of the contract, insurance coverage as follows:

- (1) General Liability Insurance as follows: Occurrence form commercial general liability insurance with the following minimum limits:
 - (a) Each Occurrence - \$1,000,000.00;
 - (b) Damage to Rented Premises – \$50,000.00;
 - (c) Med. Exp. (Any one person) – \$5,000.000;

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- (d) Personal & Adv. Injury – 2,000,000.00;
 - (e) General Aggregate - \$2,000,000.00;
 - (f) Products – Comp/Op Agg. - \$2,000,000.00; and
 - (g) Other – N/A;
- (2) Automobile Liability Insurance: With minimums to satisfy the State of Utah’s requirements;
- (3) Workers Compensation and Employers’ Liability: With minimums to satisfy the state of Utah’s requirements or a valid waiver issued by the appropriate department of the state of Utah; and

J. Indemnification: If awarded a contract and consistent with the terms and provisions of the written contract between San Juan County and the selected party, the selected party, for itself, and on behalf of its representatives, among others, shall agree and promise to indemnify, defend, save and hold harmless San Juan County, and San Juan County’s representatives, among others, from any and all claims, among other things.

K. Infringement: An interested party shall not infringe on patents, copyrights, trademarks, or intellectual property rights. The consequences from violation, including costs of defending a claim and indemnification from an action of claim by a third party, shall be borne by the selected party.

L. Warranties. If products, goods, or otherwise will be supplied or provided by the selected party, the selected party shall agree to the specific warranty provisions that are as follows:

1. The Service Provider warrants to San Juan County that:
 - a. All materials and equipment furnished under this contract shall be:
 - i. New;
 - ii. Of reasonable quality; and
 - iii. Free from faults and defects; and
 - b. All services performed under this contract shall:
 - i. Be of responsible quality;
 - ii. Conform with reasonable professional standards; and
 - iii. Conform to codes, regulations, and laws.
 - iv. Materials, Plans, Artwork, Drawings, Brochures, Maps, and Documents produced under this contract will be owned by San Juan County upon completion. San Juan County may use these items in future projects or opportunities as the County needs arise without written consent or authorization from any other party.
2. Service Provider shall correct or replace any materials or equipment that do not satisfy subsections L.1.(a)(i)-(iv.) within 30 days after San Juan County’s written or electronic mail notice of error or need for corrections.

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3. Service Provider shall correct any services performed that do not satisfy subsection L.1.(b).(i.)-(iv.) within 30 days after San Juan County's notice.
4. The parties acknowledge that the warranties set forth in Title 70A, Chapter 2, Part 3, Utah Code Annotated, apply to this contract.

M. Conflicting Terms of Provisions: If any portion of this RFP conflicts in whole or in part with a written agreement entered into between the selected party and San Juan County subsequent to the issuance of this RFP, the subsequent written agreement between the selected party and San Juan County shall control.

16.0 RFP SUBMISSION REQUIREMENTS AND NOTICE TO INTERESTED PARTIES ON HOW TO POTENTIALLY PROTECT CERTAIN PORTIONS OF THEIR PROPOSALS

All interested parties shall submit **five (5) copies** of their proposal to San Juan County along with the completed form attached as "Attachment A" hereto. **Four copies of the interested party's proposal shall be a full and complete copies and shall be submitted in hard copy form by either mailing or hand delivering such copy as follows:**

If Provided by Mail:

San Juan County
Attn: Purchasing Agent
117 South Main Street, PO Box 9
Monticello, Utah 84535

If Provided by Hand Delivery:

San Juan County
Attn: Purchasing Agent
117 South Main Street, Room #202
Monticello, Utah 84535

The fifth copy shall be submitted in "PDF" form. This copy may be submitted on a CD, flash drive, or other electronic storage medium and provided, along with the first copy, either in the mail or by hand delivery.

If the interested party's proposal either does not contain information that may be protected under Section 63G-2-305(1) or (2) of the Utah Code or the interested party does not want to protect information that could be protected under Section 63G-2-305(1) or (2) of the Utah Code, then the interested party's second copy of its proposal, provided in "PDF" form, shall be a full and complete copy of the interested party's proposal.

If, however, the interested party's proposal does contain information that may be protected under Section 63G-2-305(1) and/or (2) of the Utah Code, and the interested party would like to protect

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such information in its proposal, then the interested party shall comply with Section 63G-2-309 of the Utah Code.

If the interested party does not strictly comply with all of the foregoing provisions of this section, San Juan County, upon receiving a GRAMA request for the interested party's proposal, will release a full and complete copy of the interested party's proposal.

All costs associated with the preparation of the proposal, as well as any other related materials, will be the sole responsibility of the interested party. All proposals become the property of San Juan County upon submission. San Juan County reserves the right, but is not obligated, to reject any or all proposals submitted.

Further submission requirements are set forth in the sections below:

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Attachment A

San Juan County RFP Form

Respondent Information: Provide the following information about yourself and your company.

Respondent Name: _____
(Note: give exact legal name as it will appear on the contract, if awarded)

Address: _____

City: _____ State: _____ Zip: _____

Business Structure:

- Individual or Sole Proprietorship
- Partnership
- Corporation
- Limited Liability Company
- Other, list business structure _____

Insurance Certificate: _____ If you have provided a Copy of insurance certificate, or _____ You are willing to obtain the proper insurance requirements if awarded the contract during contract negotiation.

Contact Information: List the one person who San Juan County or their representative may contact concerning your proposal.

Name: _____

Telephone Number: _____

E-Mail: _____

Final Bid/Pricing Structure:

By submitting this proposal, _____ hereby certifies our willingness to enter into a contract with San Juan County, if selected.

Signature _____

Date _____