

State of Oregon



Department of Administrative Services
State Procurement Office
REQUEST FOR INFORMATION (RFI)

Seeking Information About
**Workforce Housing Initiative For
Governor's Office - Regional Solutions Program**
Oregon Housing and Community Services Department
Business Oregon
Department of Land Conservation and Development
Oregon Department of Transportation
Department of Environmental Quality
Department of State Lands

ORPIN Number DASPS-2839-17

Date of Issue: September 1, 2017

Responses Due Date: October 2, 2017

Issuing Office: DAS/SPO State Procurement Office

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Introduction

The State of Oregon acting by and through its Regional Solutions Program in the Governor's Office is issuing this Request for Information (RFI) to solicit information from entities actively engaged in producing workforce housing that will support economic growth and permanent family wage jobs in Oregon. The Regional Solutions program works across state agencies to align resources and policies to address economic development priorities. This RFI is jointly designed by the Governor's Office and Regional Solutions agencies, who have identified tools to support workforce housing public private partnerships, including access to loans, grants and targeted technical assistance (Appendix 1).

In order to assess solutions to the workforce housing crisis, we seek responses from any private or public entity with information related to workforce housing. This may include developers, municipalities, employers, financial institutions, philanthropic organizations or other groups. Entities are invited to respond individually or jointly. Responses to this RFI will assist in identifying best practices for possible inclusion in future procurement documents. Understanding the opportunities and obstacles around workforce housing will provide a framework for designing a Request for Proposals (RFP) to meet community needs.

Background

One of the most pervasive constraints to economic growth that Governor Kate Brown has heard throughout the state is a lack of workforce housing. Good jobs go unfilled because candidates can't find an appropriate place to live. This is a lost opportunity for Oregon workers and employers.

While Oregon Housing and Community Services (OHCS) is working to address housing needs below 60% Area Median Income (AMI), there are no dedicated tools for "missing middle" housing and the market is not producing enough new housing supply to meet the needs of the workforce above 60% AMI. This lack of "workforce housing" undermines community vitality, hitting rural areas particularly hard. Oregonians with lower to mid-range salaries struggle to find a suitable home for their family near their work. And employers ranging from manufacturing and engineering to health and education are unable to reach their full potential.

Governor Brown directed Regional Solutions agencies to find solutions to the workforce housing problem. In recent months, Regional Solutions and OHCS convened roundtable conversations with housing developers and business leaders. These meetings helped all participants better understand the challenges and opportunities related to workforce housing. Employers, developers, and state agencies expressed a strong interest in working collaboratively to alleviate this problem.

This RFI is the next step to inform the Governor's Workforce Housing Initiative, which may include pilot projects in interested communities and access to additional state resources. We know Oregon's housing challenges developed over many years and are fraught with complexity. Regional Solutions is encouraged by the diverse partners and leaders who have joined us in this endeavor. The intent of this RFI is to broaden and deepen the dialogue as well as determine practical next steps to: 1) increase the availability of workforce housing in target communities within the next two years; 2) identify successful approaches for expansion to other communities; 3) inform longer range housing strategies and discussions with the Oregon legislature.

*Note: Workforce Housing is defined for purposes of this Initiative as homes (rental or owned) for Oregonians with incomes between 60%-120% AMI.

Objectives

The objectives of this Workforce Housing Initiative RFI are to:

- Gain insight that will help build a sound Request for Proposals (RFP) to solicit pilot projects that will produce workforce housing, thus enabling job retention and creation.
- Leverage limited state investments with investments from other partners including employers, local jurisdictions and/or philanthropy to produce workforce housing.
- Find innovative and replicable solutions to a decades-long issue in Oregon.
- Deepen the state’s understanding of workforce housing challenges, qualifying and quantifying the challenges with discrete numbers and examples.
- Gain a better understanding of the various entities, coalitions, efforts, and projects engaged in addressing workforce housing challenges linked to economic development efforts.
- Enhance the quantity and quality of the “Workforce Housing Initiative Draft Tools” (further referred to in this document as “draft tools”).

Questions

- What is the workforce housing need in your community? Be specific with criteria and metrics. Examples might include data from a recently completed Housing Needs Analysis, Housing Market Study, or quantified numbers of units from employers. Identify if the priority is homeownership or rental.
- What are the barriers to development in your community? These could be regulatory, statutory, financial, market-driven, related to local capacity, or other.
- Is your community or organization ready to participate in a pilot program? Examples of a readiness metric might include a recently completed Goal 10 analysis for communities, employer engagement, and public or private investment in addressing the issue.
- What do you see as the unique challenges and opportunities related to workforce housing in your area? Is your community already pursuing some solutions?
- Are there identified project sites and developers actively working on feasibility? If applicable, provide financial analysis about funding gaps and provide lender feedback about the project(s).
- How would you apply the draft tools to address workforce housing needs in a community (or several communities) in Oregon? Be specific and realistic in applying the tools and dollar allocation from flexible pots.
 - Who would you partner with in meeting those needs?
 - What resources would you use to leverage and maximize state resources on the table?
- What other tools would be most helpful to you in addressing this initiative? Are you aware of success stories in Oregon or other states?

- With economic development as the target of this initiative, how would you engage employers in addressing the workforce housing needs of their workers? How would the proposed housing project assist an employer in retaining jobs or creating jobs?
- Please provide any other insight you think would be helpful to us in crafting an RFP.

PARTICIPATION IN THIS RFI

RESPONDER PARTICIPATION

Responders can be developers, employers, cities, or other engaged parties actively working to address housing issues and opportunities. Responses can be submitted by an individual or jointly by a team. Responders submitting timely responses to this RFI that identify innovative solutions to the workforce housing crisis may be invited to meet with the Regional Solutions team to discuss their solution and its components including gaps in financing, hurdles and other obstacles identified through this RFI process.

It is very important that the state support its local businesses and various socioeconomic programs, including but not limited to, the Office of Minority, Women and Emerging Small Business (OMWESB) registered and disabled veteran-owned businesses. A listing of OMWESB certified firms is available at <https://oregon4biz.diversitysoftware.com/FrontEnd/VendorSearchPublic.asp>.

This RFI may or may not result in a Request for Proposals (RFP). Responses provided to this RFI will be used only for general information purposes and will not be considered binding on any party. Responses provided to this RFI will also not have any impact on any RFP selection process.

Submission of a response to the RFI does not constitute an agreement between the State and the Respondent, nor does it secure or imply that Respondent will be selected or given any preferential access or availability to future funding opportunities that may arise as a result of this RFI.

RESPONDER SUBMISSION

Information and responses to questions should be succinct providing the reviewer adequate information to determine workforce housing needs, hurdles and gaps to completing a successful workforce housing project. Identify the RFI name and number, the contact person name, agency name and address. Responses can be emailed to Tim.Jenks@Oregon.Gov or mailed to The Department of Administrative Services, Procurement Services, 1225 Ferry Street SE U140, Salem, OR 97301.

All responses and any accompanying documentation become the property of the State of Oregon, subject to the Oregon Public Records Law, and will not be returned.

Regional Solutions will not be responsible for any error or omissions from downloading the RFI. The official RFI document is the one held at the Regional Solutions office.

COSTS and FEES

All costs associated with responder's preparation and submission of this RFI are the sole responsibility of the Responder and shall not be borne by Regional Solutions or the State of Oregon.

General Process Information

SCHEDULE

Following are key dates specific to this RFI:

RFI Issued	September 1, 2017
Questions for Clarification	September 15, 2017
Closing	October 2, 2017

Public Record/Confidential or Proprietary Information

This RFI and one copy of each original response received in response to it shall be kept by Regional Solutions and made a part of a file or record that may be open to public inspection. If an RFI response contains any information that is considered a trade secret under ORS 192.501(2), or is otherwise exempt from disclosure under the Oregon Public Records Law, ORS 192.410 through 192.505, if applicable, the vendor shall complete and submit the Affidavit of Trade Secret (Attachment A to this RFI) and a fully redacted version of its response, clearly identified as the redacted version.

If applicable, the Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and some exemptions from disclosure apply only “unless the public interest requires disclosure in the particular instance.” Therefore, non-disclosure of documents or any portion of a document submitted as part of a response to this RFI may depend upon official or judicial determinations made pursuant to the public records laws and requirements. If applicable, Regional Solutions may give vendor notice of any required disclosure and cooperate with vendor, at vendor’s expense, in seeking reasonable protective arrangements. However, Regional Solutions shall not be required to act in a manner which would result in any sanctions or other penalties.

Vendors are cautioned that cost information generally is not considered a trade secret under Oregon Public Records Law (ORS 192.410 through 192.505) and identifying the submission, in whole, as exempt from disclosure is not acceptable.

Attachment A – AFFIDAVIT OF TRADE SECRET

_____ (Affiant), being first duly sworn under oath, and representing [insert Vendor Name] (hereafter “Vendor”), hereby deposes and swears or affirms under penalty of perjury that:

- 1. I am an employee of the Vendor, I have knowledge of the Request for Information referenced herein, and I have full authority from the Vendor to submit this affidavit and accept the responsibilities stated herein.
- 2. I am aware that the Vendor has submitted a submission, dated on or about [insert date] (the “Submission”), to Regional Solutions in response to Request for Information (RFI)#DASPS-2839-17, for the Workforce Housing Initiative and I am familiar with the contents of the RFI and Submission.
- 3. I have read and am familiar with the provisions of Oregon’s Public Records Law, Oregon Revised Statutes (“ORS”) 192.410 through 192.505, and the Uniform Trade Secrets Act as adopted by the State of Oregon, which is set forth in ORS 646.461 through ORS 646.475. I understand that the Submission is a public record held by a public body and is subject to disclosure under the Oregon Public Records Law unless specifically exempt from disclosure under that law.
- 4. I have reviewed the information contained in the Submission. The Vendor believes the information listed in Exhibit A is exempt from public disclosure (collectively, the “Exempt Information”), which is incorporated herein by this reference. It is my opinion that the Exempt Information constitutes “Trade Secrets” under either the Oregon Public Records Law or the Uniform Trade Secrets Act as adopted in Oregon because that information is either:
 - A. A formula, plan, pattern, process, tool, mechanism, compound, procedure, production data, or compilation of information that:
 - i. is not patented,
 - ii. is known only to certain individuals within the Vendor’s organization and that is used in a business the Vendor conducts,
 - iii. has actual or potential commercial value, and
 - iv. gives its user an opportunity to obtain a business advantage over competitors who do not know or use it. or
 - B. Information, including a drawing, cost data, customer list, formula, pattern, compilation, program, device, method, technique or process that:
 - i. Derives independent economic value, actual or potential, from not being generally known to the public or to other persons who can obtain economic value from its disclosure or use; and
 - ii. Is the subject of efforts by the Vendor that are reasonable under the circumstances to maintain its secrecy.
- 5. I understand that disclosure of the information referenced in Exhibit A may depend on official or judicial determinations made in accordance with the Public Records Law.

Affiant’s Signature

State of _____)

) ss:

County of _____)

Signed and sworn to before me on _____ (date) by _____ (Affiant’s name).

Notary Public for the State of _____

My Commission Expires: _____

EXHIBIT A

Vendor identifies the following information as exempt from public disclosure:

TOOLS TO SUPPORT PUBLIC-PRIVATE PARTNERSHIP FOR WORKFORCE HOUSING

With the leadership of Governor Kate Brown, Regional Solutions agencies are looking at their current programs and tools to find opportunities to partner with communities, the business sector, and private housing developers to address the workforce housing shortage in Oregon. This problem has developed over decades and will not be solved overnight, but the Governor is committed to finding new ways forward.

The initial search uncovered the following tools, which agency directors and the Governor's staff are vetting with a variety of stakeholders.

Pilot Project Fund

Agencies have identified two separate sources of flexible funds to support a limited number of pilot projects that will be selected through an RFI/RFP process:

- 1) Up to \$1 million in funding for predevelopment, site readiness, gap funding on mixed income multifamily rentals. Funding will also support community readiness and innovative partnerships and programs, such as employer assisted housing initiatives, land trusts, and homebuyer education.
- 2) Funding for public/private partnerships with traded-sector companies that demonstrate a concrete link between a housing project (unit production) and permanent job creation or retention.

Loans

Agencies have identified two pools of loan funds. These loan funds can be deployed independently or as part of a pilot project:

- 1) Up to \$3 million in loan funding targeted to workforce housing projects and infrastructure that supports workforce housing projects. These loans currently bear an interest rate of 3.89 percent with initial loan terms starting at 25 years or the useful life of a project. Terms can be extended.
- 2) Loan funds targeted at a variety of other specific infrastructure needs, like water or waste water, and mostly used for municipal systems, not developments.

Available Property

Agencies have prepared lists of properties they own that are in the queue for sale or under consideration for sale.

Community Readiness Assistance/Planning Tools

Agencies have identified three separate opportunities for grant funds/program participation related to workforce housing:

- 1) Grants to local governments to complete studies of housing stocks and needs and develop strategies and codes to meet needs.
- 2) Grants that focus on the nexus between land use and transportation. These grants can help update code to promote efficient land use and transportation systems and help communities identify ways to meet these goals on site-specific projects.
- 3) Urban growth boundary expansion pilot project for affordable housing. Only two communities will be selected for this opportunity, one under 25,000 and one over 25,000.

Revitalization Grants

The Oregon Main Street (OMS) Revitalization Grant has funded workforce housing projects. Funds can be used by OMS Network communities to acquire, rehabilitate, or construct compatible in-fill buildings in designated downtown areas that spur economic development and commercial historic district revitalization, including creation of upper-floor housing.

