



SOUTH DAKOTA  
**Native Homeownership  
Coalition**

[www.sdnativehomeownershipcoalition.org](http://www.sdnativehomeownershipcoalition.org)

**REQUEST FOR PROPOSALS:  
HOUSING NEEDS  
STUDIES**

August 2015

With support from the South Dakota Governor's Office and the South Dakota Housing Development Authority, the South Dakota Native Homeownership Coalition (Coalition) will be conducting housing needs studies (Studies) in two small tribal communities (population of 10,000 or less) in South Dakota. These Studies should be designed to aide community members and decision makers in developing a meaningful sense of the housing market in their community and play an important role in effective planning for future housing efforts.

The Coalition is requesting proposals from interested parties to develop and conduct Studies of two selected tribal communities. Each of the Studies must provide a measured assessment of present and future unmet housing demand, focusing on informing a deeper understanding of short- to mid-term housing demand (2 year, 5 year, 10 year, and 15 year). The Studies are intended to offer community leaders a basis for decisions regarding community-specific housing policy alternatives and intervention strategies.

The Coalition will be choosing one organization with which to contract referred to hereafter as the Consultant. The Consultant will enter into a contract with Lakota Funds as the fiscal agent for the Coalition.

The total budget for each Study should not exceed \$20,000. Once tribal communities are selected for the Studies, the Consultant may be asked to adjust the proposed budget to reflect the actual work to be performed based on the communities selected. The Coalition will pay the Consultant as follows: (1) 25% at the time an individual contract is executed by the Coalition and the Consultant, (2) an additional 50% at the time of receiving a draft of the Study, and (3) the final 25% upon receipt of the final Study.

Interested parties may submit proposals according to the guidelines described below by September 1, 2015. The Coalition will be accepting questions on the Request for Proposals from August 1 – August 15, 2015. Questions will be submitted and answered through an open and transparent platform on our website.

## About the Coalition

The South Dakota Native Homeownership Coalition was created in 2013 by a diverse group of stakeholders working to increase Native homeownership opportunities in South Dakota. Stakeholders include approximately 75 representatives of South Dakota's tribes, federal and state agencies, the South Dakota Governor's Office, Tribally Designated Housing Entities (TDHEs), nonprofit organizations, housing developers, lenders, and community development financial institutions. The Lakota Funds ([www.lakotafunds.org](http://www.lakotafunds.org)) serves as the fiscal agent.

The Coalition was created to remove the obstacles to Native homeownership by:

- Leveraging members' knowledge and resources to improve Native homeownership rates in South Dakota;
- Providing peer-sharing and networking opportunities;
- Increasing understanding about and streamlining the approval process for land leases and leasehold mortgages;
- Supporting contractors' efforts to build more homes;
- Offering technical assistance to TDHEs and other housing developers to put together housing finance packages to support the development of new homeownership units;
- Encouraging planning initiatives on tribal land to install infrastructure to support residential development; and
- Providing instructor training opportunities to increase the capacity of housing practitioners to prepare clients for homeownership.

## Accomplishments

Some of the Coalition's accomplishments over the past two years include:

- Conducting a strategic planning session to develop goals and milestones to address barriers to Native homeownership in South Dakota;
- Developing a Native Homeownership Track for the first time at the Annual State Housing Conference in 2014, with workshops on land issues, homebuyer readiness, funding resources, sustainable construction, and partnering with Native organizations;
- Holding a one-day tour and convening on the Pine Ridge Reservation focusing on successful homeownership efforts;
- Arranging a tour of the T Yamni Sisseton Wahpeton Oyate Housing Authority's housing development effort and attending homeownership fair;
- Providing three-day instructor certification trainings on financial education and homebuyer education;
- Holding a series of meetings with contractors to look at how the Coalition can support their efforts to build more homes;
- Partnering with South Dakota State University to gather baseline data on Native homeownership efforts; and
- Developing a resource guide on homeownership and asset-building.

## Key Topics to Address

Each Study should address the following:

- What are the demographic and economic characteristics of households in the community? What is the current income level of households in the community, and what is the anticipated income level in the future?
- What are the expectations with respect to economic, employment, and population change in the community in the next 2 to 5 years, the next 10 years, and the next 15 years?
- Based on market information, what is the nature and extent of the community's short- to mid-term housing demand and long-term housing demand? What is the demand in various categories, including: new construction, rehab, senior housing, family housing, rental, and homeownership? What is the price range for demand in various categories? Are there any specialized housing needs/demands, such as live-work space, accessibility, energy efficiency, transitional housing, etc.?
- What is different between this Study's findings and that of prior studies? If the results found and forecasts developed under this Study differ from previously published studies for the community, note reasons for the divergence.

## Minimum Required Data Elements

The Consultant selected to complete the Study is free to develop specific methodology as it deems appropriate, but each Study must be consistent with other Studies completed. Each Study must, at a minimum, quantify the following data elements:

1. Existing housing stock
  - By tenure – rent, own
  - By type – single, multi-family, manufactured
  - By value – property values, rents
  - By age and condition
2. Other housing issues
  - Affordable housing – TDHE Housing, Low Income Housing Tax Credit, USDA
  - Senior/assisted living options
  - Building permit history (community's experience with new construction)
3. Homeownership information
  - Interest in homeownership
  - Income levels and repayment ability
4. Information on housing providers and programs (including capacity and track record)
  - Developers
  - Homeownership and financial education providers

Loan packagers

Community Development Financial Institutions

Key private service providers (insurers, contractors, inspectors, etc.)

5. Potential barriers to homeownership in community
  - Physical infrastructure (water, wastewater, roads)
  - Legal infrastructure (mortgage ordinance, foreclosure ordinance)
  - Leasehold mortgage process through Bureau of Indian Affairs and tribal realty office
  - Availability of contractors
6. Demographics – now and future (2 year, 5 year, 10 year, and 15 year)
  - Population by age
  - Households by income, age, size
  - Migration patterns
7. Economics
  - Economic base – by industry and key employer
  - Anticipated employment trends
  - Commuting patterns – employment and services
8. Recommendations on how to address housing needs and build on existing homeownership opportunities (based on analysis of data collected)

## Assessment Process and Timeline

The Studies will be overseen by the Coalition and a representative of the sponsoring tribal organization for which each Study is being conducted. The sponsoring tribal organization will name a primary contact who will serve as the liaison between the Coalition and the Consultant.

### LOCAL CAPACITY BUILDING APPROACH

Local capacity building is a priority for the Coalition. In designing the Study methodology, the Consultant should incorporate local capacity building efforts and work closely with the tribal community to be assessed. Capacity building efforts should include an explanation of the Study at the outset to sponsoring organization staff and other appropriate community members, engaging staff in study design and information gathering strategies, and a presentation of results at the completion of the Study.

### INPUT AND COMMUNITY RELATIONS

The Consultant will meet with the sponsoring organization regularly (at least twice at minimum, at the outset and conclusion) during the Study process. The Consultant will hold a community meeting prior to or during the Study process, allowing community members to ask questions and provide information for the Study. The Consultant may also conduct a resident survey, hold additional community meetings, and use other methods to gather additional input.

### TIMELINE FOR STUDY PROCESS

Publish Request for Proposals	August 1, 2015
Question period	August 1 – August 15, 2015
Proposals due to the Coalition	September 1, 2015
Select Consultant	September 15, 2015
Commence work on Studies	By October 1, 2015
Presentation of Study plans to Coalition	October 27, 2015
Presentation of Studies to communities	By March 31, 2016
Final draft/all work products due	March 31, 2016

### WORK PRODUCT

The final Study for each community must be delivered to the community both as a PDF file and in hard copy, with five (5) bound copies. The final Study must be delivered to the tribal communities within six (6) months of selection of the Consultant. If the Consultant makes a final presentation to the community, an electronic copy of that presentation should be provided as well.

## Criteria for Evaluation of Proposals

1. Qualifications of Consultant 35 points
  - Experience completing this type of housing needs study
  - Experience working in tribal communities
  - Copy of a previously completed housing needs study should be provided as an example of the Consultant's work product
  
2. Proposed study methodology 30 points
  - Sources of data
  - Interaction with community
  
3. Understanding of RFP 25 points
  - Community context
  - Goals and purpose of Study
  
4. Adherence to Timeline 10 points
  
5. Cost of Services  
RFPs will not be scored based on Cost of Services, however, the cost will be considered when evaluating proposals. The proposal should include an estimated cost to complete individual community Studies and the criteria for variances in cost, if applicable.

## Proposal Components

A complete submission will include:

1. Narrative response to Request for Proposals/Approach  
State your firm's approach to the scope of work outlined above, focusing on both the assessment design and the capacity building component. In addition, please address any relevant experience, describing any similar service contracts that your firm has delivered on, along with outcomes resulting from the services delivered.
2. Proposed timeline for Study process
3. Brief statement of qualifications  
Provide an overview of your firm and resumes of team members that will be assigned to this project. Please discuss your knowledge of housing issues on Indian reservations.
4. List of references for similar projects
5. Sample of housing needs study
6. Cost proposal  
Your proposal should include a detailed cost estimate of fees required to meet the objectives described in this Request for Proposals.

### **SUBMITTING PROPOSALS**

Responses to this Request for Proposals should be submitted by **September 1, 2015** by email to Leslie Newman at [lesliefnewman@gmail.com](mailto:lesliefnewman@gmail.com).

### **QUESTIONS**

The Coalition will be accepting questions regarding the Request for Proposals from **August 1 – 15, 2015**. Questions will be submitted and answered through an open and transparent platform on our website. Please submit questions through the Comments platform here:

**<http://sdnativehomeownershipcoalition.org/studies>**