



Office of Purchasing/Contracting 324 W. Evans Street Florence, South Carolina 29501

**REQUEST FOR PROPOSALS NO. 2024-71
PROFESSIONAL SERVICES TO CREATE A
HOUSING STUDY AND NEEDS ASSESSMENT
SUBMISSION DEADLINE: September 12, 2024, 2:00 pm**

PURPOSE OF THE REQUEST FOR PROPOSALS

The City of Florence, South Carolina (the City) is soliciting proposals from qualified consulting firms specializing in the development of a housing study and needs assessment. The selected proposal will provide the City with an assessment identifying existing and future housing stock within the community and will identify strategies that will help ensure the City's housing market provides the needed diversity of housing stock and meet the projected growth over the next several years. The assessment is expected to include an analysis of existing housing conditions, demographic and market demands, and identification of critical housing gaps. Responses should be submitted based on the information and guidelines provided in this Request for Proposals (RFP).

This RFP is being publicly advertised. The City will make the selection based on the responses submitted, interviews with firms, and then negotiate a final agreement with the selected firm. Responders are welcome to establish consortiums or teams of firms in connection with this RFP. The final selection of the firm will be based on the criteria set forth in this RFP.

All responses must be sealed and have "**RFP 2024-71 Request for Proposals for Professional Services to Create A Housing and Needs Assessment**" clearly marked on the outside for ease of identification by the City. Submit one (1) original and four (4) copies of the proposal. Responses may be hand-delivered prior to the submission deadline at the address listed above. The City does not accept electronic/mailed responses. Directions may be obtained by calling (843) 665-3165. Any response received later than the submission deadline **WILL NOT BE ACCEPTED OR CONSIDERED**.

Responses submitted by mail should be addressed to: **City of Florence, Attn: Lynwood F. Givens, Purchasing Agent, 324 W. Evans Street, Florence, SC 29501**. The City will not be responsible for late submission caused by the postal service, other carriers, or any other delivery problems regardless of the reason.

This solicitation does not commit the City of Florence to award a contract, to pay any costs incurred in the preparation of a response, or to procure or contract for services. The City of Florence reserves the right to accept or reject any or all submissions received as a result of this Request for Proposals, or to cancel it in part or in its entirety if it is in the best interest of the City of Florence.

Lynwood F. Givens
Purchasing Agent

MINORITY AND WOMAN OWNED BUSINESS

Minority Business Owners (minority or woman owned businesses) will be afforded full opportunity to submit a response to the Request for Proposals and will not be discriminated against on the grounds of race, color, creed, sex, or national origin in consideration for an award. It is the policy of the City that minority business and women owned business enterprises (MBE/WBE) have an opportunity to participate at all levels of contracting in the performance of City contracts to the extent practical and consistent with the efficient performance of the contract. Please indicate that you are a minority or woman owned business with your proposal submission.

The successful contractor(s) must ensure that all subcontractors, agents, personnel assigned by or employees of prime company and subcontractors are not discriminated against because of their race, color, religion, sex, or national origin. The successful contractor(s) must make positive efforts to provide equal employment opportunity for minority and women owned businesses.

All submitted materials shall become the sole property of the City of Florence. Contractors will relinquish claim for return of submitted material. The City shall have sole discretion in evaluating the responses. The City reserves the right to reject any and all responses and is not bound to accept any response if it is contrary to the best interest of the City.

INSTRUCTIONS

Responses to the Request for Proposals will only be accepted from responsible and responsive companies that have an established reputation in the field of history, architecture, architectural history, or historic preservation, as well as demonstrated experience creating design guidelines and experience working with local design review boards and commissions.

No response may be withdrawn for a period of ninety (90) days after the submission date.

A responsive company is defined as one that has the capability in all respects to perform fully the requirements mentioned in the RFP document and the integrity and reliability which will assure good faith performance.

A responsive company is defined as one that has submitted a response which conforms in all respects to the RFP requirements.

Protest Period: Any actual or prospective company that is aggrieved in connection with the solicitation or award of a contract/purchase order may formally protest in writing to the Chief Financial Officer. The protest may be submitted at any time during the procurement process. However, if a prospective company wishes to protest, the formal protest must be submitted in writing and must be received by the City no later than seven (7) days from the date that the aggrieved actual or prospective company has been informed of the proposal results by the Purchasing Agent. Protests received by the City after the expiration of the seven (7) day protest period will not be considered by the City.

Disputes: In cases of disputes as to whether or not an item or service quoted or delivered meets the scope of work, the decision of the City of Florence shall be final and binding on all parties. The Purchasing Agent may request in writing the recommendation of the head of the department of the end user or other objective sources.

Deviations: Any deviations from the scope of services contained herein must be stated in the response for the City of Florence's consideration.

Changes: Any changes in this Request for Proposal after a contract agreement has been awarded must be with the written consent of the Purchasing Agent or the City Manager; otherwise, the responsibility for such changes lies with the company. Any changes to the scope of services in this Request for Proposals package shall be in writing and an addendum will go out to all prospective respondents so each respondent can compete equitably.

Ownership Of Material: Ownership of all data, material and documentation originated and prepared for the City of Florence pursuant to this contract shall belong exclusively to the City of Florence.

QUESTIONS AND INQUIRIES: The deadline for the submission of any and all questions and inquiries concerning this RFP is September 5, 2024 at 5:00 pm. All questions must be directed to Lynwood F. Givens, Purchasing Agent in written format and e-mailed to lgivens@cityofflorence.com.

A complete copy of the City of Florence Purchasing Policies and Procedures Manual can be downloaded from the City of Florence website at www.cityofflorence.com.

PROJECT DESCRIPTION

The general purpose of the assessment is to identify existing and future housing stock within the City of Florence and identify strategies that will help ensure the City's housing market meets the projected growth. Based upon the 2020 Census, the Pee Dee region of South Carolina is projected to lose population, Florence County is projected to maintain population, and the City of Florence is projected to have minimal growth. After the official census, there have been multiple industrial economic development announcements including the AESC battery plant that will provide 1,300 new jobs. Additionally, the City of Florence and Florence County has experienced significant commercial development growth along with several thousand units of residential development. This recent success should be taken into consideration when conducting the assessment. The assessment must include an analysis of the existing housing market and conditions, analysis of demographic and market demands, and identification of critical housing gaps and needs. The study must also include an analysis of affordable housing and related needs.

SCOPE OF SERVICES

TASK 1: Housing Initiatives

- a. The Consultant will review relevant existing documentation, plans, studies, efforts, organizations, and programs relevant to the housing market in the City of Florence.
- b. The Consultant will identify sources of funding for technical assistance for housing and other related programs included in the current housing initiatives.
- c. The Consultant will review programs to identify redundancy, coordination and collaboration across multiple agency efforts.
- d. The Consultant will meet and interview major stakeholders, as necessary, to discuss the City's housing needs and existing efforts. City staff will work with the Consultant to facilitate the identification of key stakeholders and the compilation of data in the City.
- e. The Consultant will synthesize the baseline inventory of current services and programs, private, nonprofit, and public operators and providers in the City that supply housing to qualifying residents.

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

TASK 2: Demographic, Geographic and Economic Data

- a. The Consultant will gather specific data relevant to population, household, housing and employment statistics including, but not limited to, historical and population growth trends, demographic data, household data, and employment data.
- b. The Consultant will conduct population forecasting for the City of Florence as a whole.

- c. The Consultant will examine at-risk populations such as those in poverty, the homeless, sensitive populations, the elderly, the disabled etc. and identify any concentrated areas of poverty with regard to developing fair housing policies.

Deliverable: The Consultant will provide a Technical Memorandum including maps, graphics, charts or other relevant depictions of the information gathered in Task 2.

TASK 3: Housing Stock, Trends and Projections

- a. The Consultant will review the current housing inventory and provide specific metrics for the City of Florence regarding housing condition, ownership, type of dwelling, age of units, multiple-family units, neighborhood character, availability of utilities, access to services, etc.
- b. The Consultant will provide an inventory of existing subsidized housing, including availability, new or future subsidized housing, and other dwellings which serve as transitional and emergency housing.
- c. The Consultant will research proposed housing units, planned developments, and housing trends across the City.
- d. The Consultant will analyze and identify housing needs.

Deliverable: The Consultant will provide a Technical Memorandum 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

- a. The Consultant will study residential real estate trends of all types of housing including an analysis of past residential sales prices, length of time on the market, and other relevant real estate metrics.
- b. The Consultant shall include information from new residential units, types of building permits issued, and trends across the City.
- c. The analysis shall include the market rate for rental units in each municipality and availability of rental units across the City of Florence. Units shall be distinguished by type, number of bedrooms, size, location, and price in the analysis.
- d. Included in this report should be a summary of trends, historical data, and future projections of the housing market. Historical data of ten years shall be included, and a period of ten years for futuristic projections.

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

TASK 5: Develop Implementation Strategies and Recommendations

- a. The Consultant will develop recommendations for specific types, rate, and other housing needs based on the Market Analysis Report. This shall be specific for each municipality and for the City of Florence as a whole.
- b. The Study will provide recommendations to combat deterioration of the older housing stock.
- c. 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.
- d. The Study will include the impact that demographic changes will have on Florence's housing stock and provide recommendations for suitable housing to fit the needs of the community.

- e. The Consultant will identify sources of funding (federal, state, local and private resources) for technical assistance for housing and other related programs included in the current housing initiatives.
- f. The Consultant will prepare a summary with the recommended initiatives and impacts.
- g. The final Study should include action steps specific to which entity(ies) would implement and strategies for decision makers to use.
- h. The Study must consider existing and projected housing and economic conditions and detail how such conditions will be impacted by the Study.

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 20 paper copies and 1 electronic copy of: the Housing Needs Assessment and Market Assessment Report, the Executive Summary, and an electronic copy of the Power Point presentation(s), an electronic copy of all GIS shape files and maps, and other presentation materials.

PRE-PROPOSAL CONFERENCE (MANDATORY)

The City will host a mandatory Pre-Proposal Conference **at 324 W Evans Street, Florence, SC. This will be conducted on September 4th at 2:00pm. Virtual attendance will be permitted, and a link will be provided upon request.** Responders to the Request for Proposals are required to attend the pre-proposal conference and are encouraged to have questions prepared prior to the meeting. For questions regarding the pre-proposal conference please contact The City of Florence Procurement Officer, Mr. Lynwood Givens, at 843-665-3162 or by email to lgivens@cityofflorence.com.

CONTENT OF PROPOSALS

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. 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.
3. Qualifications
 - a. Name, address and telephone number of the firm's owners, and full information about the corporate structure of the submitting firm.
 - b. Location of the firm's primary place of business for legal purposes and any subsidiary offices, years of business, and types of services offered.
 - c. Names and qualifications of personnel to be assigned to the project.
4. Description of similar project experience and the names, addresses, and telephone number of owners for all projects described (references will be checked).
5. Curriculum vitae of principal associates and key personnel proposed to have primary responsibility for the project.

6. Current and projected workload, including a list of all projects contracted for or anticipated.
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 City should hire your firm.
8. Project History and References
 - a. Provide complete project history for minimum of four (4) projects from the consultant which meets the minimum qualification requirements. These projects will be considered in evaluating the qualifications. The information must include:
 - b. Project name and location
Name, address and telephone number for project owner, owner's project manager and/or owner's contact person on the project.
 - c. Description of the project including:
 - i. Type of project
 - ii. Initial project budget
 - iii. Initial project schedule
 - d. Role and listing of services provided by team member
 - e. Name, title and role of personnel used to perform services
 - f. Project design and delivery method used
 - g. Project state and completion dates
 - h. 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.
 - i. Breakdowns are to be shown separately for each item listed under "Scope of Work". Overhead factors and other multipliers shall be identified.
 - j. The consultant shall be responsible for all required resources to include but not limited to computers, surveys, outside consultants, etc.
 - k. While cost will not be the sole determining factor, cost will be considered. **Please submit one copy of your cost proposal in a separate envelope, clearly marked.**

EVALUATION PROCEDURE

The City of Florence 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. Prior experience with CDBG areas
4. Quality and completeness of past projects
5. Ability to complete all tasks within the allotted time
6. Presentation skills
7. Cost of services not to exceed price and cost effectiveness of proposal

8. Proposal is in the best interest of the City of Florence

The evaluation scoring system is outlined in the table below.

1. Consultant's understanding and approach to the City's required tasks and needs as demonstrated in the Consultant's response to the scope of services. (25 points)
2. Consultant's experience with similar projects comparable in type, size, and complexity. (25 points)
3. Qualifications of the Consultant's staff assigned to perform the work with this project. (25 points)
4. Demonstrated ability of the Consultant to perform high quality work, to control costs, and meet project schedules. (20 points)
5. Consultant's past performance on projects with the City. (5 points)

Right to Reject Responses, Waive Irregularities, and Conduct Ex Parte Communications with Contractors: The City reserves the right to accept or reject any and all responses, at its sole discretion, received as a result of this RFP, to waive minor irregularities, and to conduct discussions with any or all prospective applicants, in any manner necessary, to secure helpful information.

Right to Request Additional Information from Any or All Responders: The City reserves the right to request additional information from any or all prospective applicants, if necessary, to clarify that which is contained in the proposals.

Responders are requested to submit six (6) copies of the proposal. Due to time limitations of the Selection Committee members, responses should be limited to no longer than fifteen (15) single-sided pages. Please include tab dividers for easy access to each section of the proposal (tab dividers do not count toward the 15-page limit). Additional supplemental information may be submitted, under separate cover, in order to aid in firm selection. This information may include staff resumes, descriptions of similar municipal projects, project references, etc.

SELECTION PROCESS

The City has formed a Selection Committee to review the proposals and recommend a firm. The Selection Committee will be composed of the following members:

1. Planning Director
2. Utility Planning and Economic Development Director
3. Community Services Manager
4. Fire Chief
5. Assistant City Manager
6. Purchasing Agent

Any questions regarding this RFP should be addressed to the Purchasing Agent, Lynwood F. Givens in writing to lgivens@cityofflorence.com. Please do not attempt to contact members of the Selection Committee.

The Selection Committee will review all responses in accordance with the Evaluation Criteria outlined herein and make a final selection. All submissions must conform to this RFP. The Selection Committee reserves the right to interview any or all of the respondents if it is determined to be in the best interest of the City.

The submissions will be evaluated based on organization, completeness, and sufficiency of information requested throughout the submission. The factors for award directly correspond to the RFP requirements as previously outlined and have been assigned a point value.

Based upon its review of the evaluation and selection criteria itemized in the content of the proposals section, above, the Selection Committee may short-list three firms deemed to be best

suited to the needs of the City. If selected, these three firms will then be interviewed by the committee. During the interview process, the short-listed firms will be given the opportunity to discuss anticipated methods and their approach for furnishing the required services, and to seek further clarification of the project elements.

Based on the proposals and interviews with the short-listed firms, the Selection Committee will select one firm for contract negotiation. Based upon the firm's price proposal, the Committee will attempt to negotiate a scope of services and contract price that is satisfactory to the City and firm. Upon completion of the negotiations, the committee will make its recommendation to the City Manager.

The City shall have sole discretion in evaluating the responses and the suitability of the responder to meet the City's needs. The City reserves the right to select the response or responses deemed to be in the best interest of the City. The City also reserves the right to reject any and all responses.

BUSINESS LICENSE REQUIREMENT

Entities that provide goods and services within the City limits are required to have a business license. The successful contractor/company will be required to contact the Business License Office, 324 West Evans Florence, SC 29501 prior to commencement of work. The Business License Office's phone number is (843) 665-3173 and the fax number is (843) 665-3171. The City's business license application can be viewed at the following URL:

<https://www.cityofflorence.com/business-licenses/licenses-and-fees>

TAXES

The City of Florence pays SC Sales Taxes in the amount of 8%. However, the City of Florence is exempt from Federal Excise Taxes and will issue exemption certificates, if requested. **Include all taxes with your response.**

PROFESSIONAL INSURANCE REQUIREMENTS AND INDEMNIFICATION

The successful company shall procure and maintain insurance for protection from claims under workers' compensations acts; claims for damages because of bodily injury including personal injury, sickness or disease, or death of any and all employees or of any person other than such employees; claims for damages because of injury to or destruction of property, including loss of use resulting therefrom; claims caused by professional errors, acts, or omission; and any other insurance prescribed by law. The successful company shall name the City of Florence, South Carolina, its elected and appointed officials, officers, and employees "Additional Insureds" as their interests may appear but only with respect to services performed or provided by successful company on behalf of the City under Consultant's commercial general liability insurance policy. The successful company shall, within 10 days of the full execution of any contract resulting from this RFP, provide the City's Purchasing Agent with a certificate(s) of insurance evidencing the coverages required above and containing an endorsement to the effect that any cancellation or non-renewal shall not be until 10 days after the insurer or the selected company gives written notice to the City.

Without limiting the provisions of paragraph above, the selected company shall, during the term of any contract with the City, purchase and maintain insurance with limits not less than those set forth below.

The successful company shall take out and maintain, during the life of the contract agreement, workers' compensation and employer's liability insurance for all employees to be engaged in services on this project under this agreement in an amount not less than \$1,000,000.00, and in case any such services are sublet, the company shall require all subcontractor(s) also to provide workers' compensation and employer's liability insurance in an amount not less than \$1,000,000.00 for all of the subcontractor's employees to be engaged in such.

- Employer's Liability Insurance - \$1,000,000 each accident, \$1,000,000 disease policy limit, \$1,000,000 disease each employee
- Commercial General Liability Insurance - \$1,000,000 per occurrence (bodily injury and property damage) / \$1,000,000 general aggregate
- Automobile Liability Insurance - \$1,000,000 combined single limit (bodily injury and property damage), each accident
- Professional Liability Insurance - \$1,000,000 per claim / \$1,000,000 general aggregate

Professional Services: The selected company shall indemnify and hold the City of Florence, South Carolina, its elected and appointed officials, officers, and employees, harmless from and against judgments, liabilities, damages, losses, costs, and expenses (including, but not limited to, reasonable attorneys' fees and costs but only to the extent otherwise authorized by law) to the extent caused by any negligent act, error, or omission in the performance and furnishing of the selected company's professional services under any contract resulting from this RFP, including any negligent act, error or omission of any individual or entity directly or indirectly employed by the selected company to perform any of the work or anyone for whose acts, errors, or omissions the selected company may be liable, regardless of whether or not caused in part by a party indemnified hereunder.

Other Than Professional Services: With respect to all acts or omissions of the selected company, or any individual or entity directly or indirectly employed by the selected company to perform any of the work, or anyone for whose acts, errors, or omissions the selected company may be liable, which do not arise out of or result from the performance of professional services, and which may be covered by employer's liability insurance, commercial general liability insurance, automobile liability insurance, or other general liability insurance, the selected company shall indemnify and hold the City of Florence, South Carolina, its elected and appointed officials, officers, and employees, harmless from and against judgments, liabilities, damages, losses, costs, and expenses (including, but not limited to, reasonable attorneys' fees and costs but only to the extent otherwise authorized by law) to the extent caused by or arising out of the selected company's negligent acts of commission or omission (or those of or any individual or entity directly or indirectly employed by the selected company to perform any of the work or anyone for whose actions or failure to act the selected company may be liable) during the performance of this Agreement.

The selected company shall require any subconsultants and subcontractors to purchase and maintain insurance with limits not less than those required above to be purchased and maintained by the selected company. In addition, the selected company shall require any subconsultants and subcontractors to assume the selected company's indemnification obligations under any contract resulting from this RFQ to the extent they relate to the subconsultant's or subcontractor's obligations under any contract with the selected company.



REQUEST FOR PROPOSALS NO. 2024-71

Contact Information

The following form should be completed and submitted with your proposal.

Company Name:

Address:

City, State, Zip:

Phone Number:

Fax Number:

E-mail Address:

Printed Name of Authorized Agent:

Title:

Date: