



August 28, 2009

Shirley Greve
San Miguel Regional Housing Authority
820 Black Bear Rd.
Telluride, CO 81435

Dear Members of the Selection Committee:

It is with great pleasure that RRC Associates, Inc. submits this proposal to the revised RFP on behalf of RRC Associates, Inc., in team with Rees Consulting, Inc., to conduct a Housing Needs Assessment for San Miguel and Ouray Counties. The needs assessment will quantify the relationship between housing and transportation and highlight impacts within the region and on the surrounding area.

In response to your updated RFP, we have included Ouray County in the proposal. While there are some efficiencies in conducting a multi-county study, the reporting and analysis by community and county adds complication and additional analysis. We have taken this into consideration in our proposal and where possible have proposed to combine travel and interviews.

Given the regional nature of the study, we also propose a mapping component to complement and illustrate the research. This will include a map of the region that portrays the relationship between housing development patterns, commuting and economic and demographic characteristics. The intent of the map will be to promote further discussion on each county and town's role with respect to helping residents and employees afford housing in the region.

For the past eighteen (18) years, members of our team have worked with counties and local communities by conducting needs assessments that inform the creation of manageable housing strategies. We know that attention to small communities within a larger region is essential to understanding existing conditions and formulating successful strategies to address both individual community and larger area housing issues. We tie good data to policies and seek to create a wide understanding of needs upon which well-conceived actions and strategies are founded.

Based on further discussions with you, we anticipate that our proposed scope of work would be refined to best meet your needs and expectations. While we hope you find our proposal responsive to the specifications of your RFP, we know from experience that these preliminary ideas often require modification in order to address local considerations. We look forward to


working with you to refine our approach as needed, and we are flexible in terms of most aspects of our proposal, including budget and schedule.

We would be pleased to meet with you to discuss our proposal in greater detail. Please feel free to contact us at 303-449-6558.

Sincerely,



Chris Cares, AICP
Principal



Sarah McClain, AICP
Project Manager



Proposal

San Miguel County and Ouray County Housing Needs Assessment

August 2009

Submitted by:

RRC Associates, Inc
4940 Pearl East Circle, Suite 103
Boulder, Colorado 80301
sarah@rrcassoc.com
303/396-1620

Rees Consulting, Inc.
PO Box 3845
Crested Butte, CO 81224
970/349-9845



Table of Contents

<i>Introduction</i>	3
<i>A. Qualifications</i>	3
Detailed Company Background	3
Resumes of Staff Assigned to Project	4
Experience	5
<i>B. Approach</i>	9
Primary Research	9
Needs Assessment	12
Action Plan	13
Updates	14
Work Sessions and Public Participation	15
Assistance from Staff	17
Final Report Format	17
<i>C. Considerations for a Multi-County Needs Assessment</i>	17
<i>D. Costs</i>	18
<i>E. Project Schedule</i>	20
<i>Appendix A – Additional Information</i>	21

Introduction

Ouray and San Miguel Counties together function as a region, with interrelated social, economic and transportation patterns. A housing needs assessment for the region will help define these relationships, quantifying housing needs and the impacts of the commuter population. The region has experienced significant growth pressure over the last 10 years, however, trends in the national economy are being felt at the regional level. The Department of Local Affairs reports that in the first two quarters of 2009, there were 77 foreclosure filings in Ouray and San Miguel Counties together, compared to 13 filings in the first half of 2008. In light of these recent changes, it has become increasingly important to monitor local conditions in the region and to plan for future housing needs. It is often in recessionary times that the most progress can be made in the realm of affordable housing. A Housing Needs Assessment will provide baseline information from which policy decisions, local housing goals and objectives and program options can be evaluated. Ideally, Ouray and San Miguel Counties will have a mix and balance of housing that supports current and future residents as their housing needs and conditions change.



A. Qualifications

Detailed Company Background

RRC Associates, Inc., is submitting this proposal on behalf of RRC Associates, Inc., and Rees Consulting, Inc., to complete a comprehensive assessment of housing needs for the region, and, through work with the Housing Authority, elected officials, staff, community development organizations and other interested parties, develop recommendations and strategies to guide future decision making regarding the provision of affordable housing.

RRC Associates, Inc., originally formed in 1983, will be the lead contractor. Chris Cares will be the principal in charge of the project. Sarah McClain will be the project manager and will be the data to day “point” person for the firms involved in this needs assessment. RRC is an 18-person firm, specializing in affordable housing, community and economic development and survey research. RRC Associates, Inc., and Rees Consulting, Inc., are incorporated in Colorado and members of our team have worked together for eighteen years to provide customized services for our clients. We build upon the strengths of each organization to deliver a complete and accurate assessment of housing conditions in an area. Among our strengths is the ability to work with local agencies, individuals and other organizations to identify housing approaches that are customized to meet each client’s specific needs and goals, while also recognizing and addressing the constraints within each study area.

Our contact information is as follows:

Chris Cares & Sarah McClain
 RRC Associates, Inc.
 4940 Pearl East Circle, Suite 103
 Boulder, Co 80301
 303/449-6558
 303/449-6587 FAX
chris@rrcassoc.com
sarah@rrcassoc.com

Melanie Rees
 Rees Consulting, Inc.
 PO Box 3845
 Crested Butte, CO 81224
 970/349-9845
 970/349-6458 FAX
melanier@interserv.com

We have found that housing needs assessments are an important component of an overall housing strategy for any region. A needs assessment for San Miguel and Ouray Counties will provide quantitative data as well as local insights regarding opportunities and constraints that will be used to develop a comprehensive action plan to address housing needs in the region. Our unique approach to primary data collection and key informant interviews will result in a report with recommendations that are easily understood and educational. Most importantly, recommendations to address the needs identified in the study are grounded in the local communities and support the implementation of workable policies and program strategies.

Resumes of Staff Assigned to Project

Resumes of principals and staff who will work on the proposed assessment are included in the appendix. The three key persons who will be assigned to this project are as follows:

- C. Chris Cares, AICP
 Chris possesses a diverse background in public and private planning. A founding partner of RRC Associates, he specializes in practical applications of research techniques including survey research, and statistical and computer analysis for problem solving in city planning, administration, and a variety of business applications. His research and recommendations have helped to shape both the design and marketing strategies of major resorts and other developer clients, and he has coordinated the planning and public processing of numerous large resort and mixed-use projects. Market feasibility studies and housing needs assessments are a particular area of specialization. Chris has also drafted comprehensive plans, zoning ordinances, growth management plans, capital improvements programs, and related regulations for towns and cities of various sizes.
- Sarah McClain, AICP
 As a Planner at RRC Associates, Sarah has focused on conducting housing studies for many communities throughout Colorado and the West, as well as offering consultation on affordable and employee housing development and regulations. She has also been involved with community master plan and visioning processes, housing market demand studies, ski visitor research, and survey administration and interpretation. Her previous employment as a planner with the Colorado Center for Community Development provided her with valuable survey research and planning experience with many communities across the state. Sarah was born and raised in Telluride where she developed an

interest in affordable housing and economic development. Sarah has a Masters degree in Urban and Regional Planning and an undergraduate degree in Environmental Policy.

- **Melanie Rees**
Melanie started her own firm 18 years ago. She is based out of Crested Butte, CO. She previously worked as an economist for the Colorado Office of Economic Development and has since become an expert in affordable housing in high-cost areas including Denver’s downtown area, Boulder and Colorado’s mountain resort communities. The firm concentrates on housing needs assessments and market studies for affordable housing, and is an approved market analyst for programs administered by the Colorado Housing and Finance Authority and the Colorado Division of Housing.

Each will conduct key informant interviews, be involved in survey design and collect secondary data relevant to the sections of the report for which they have primary responsibility. RRC Associates will provide survey support services (printing, distribution, data entry, survey setup and statistical tabulations).

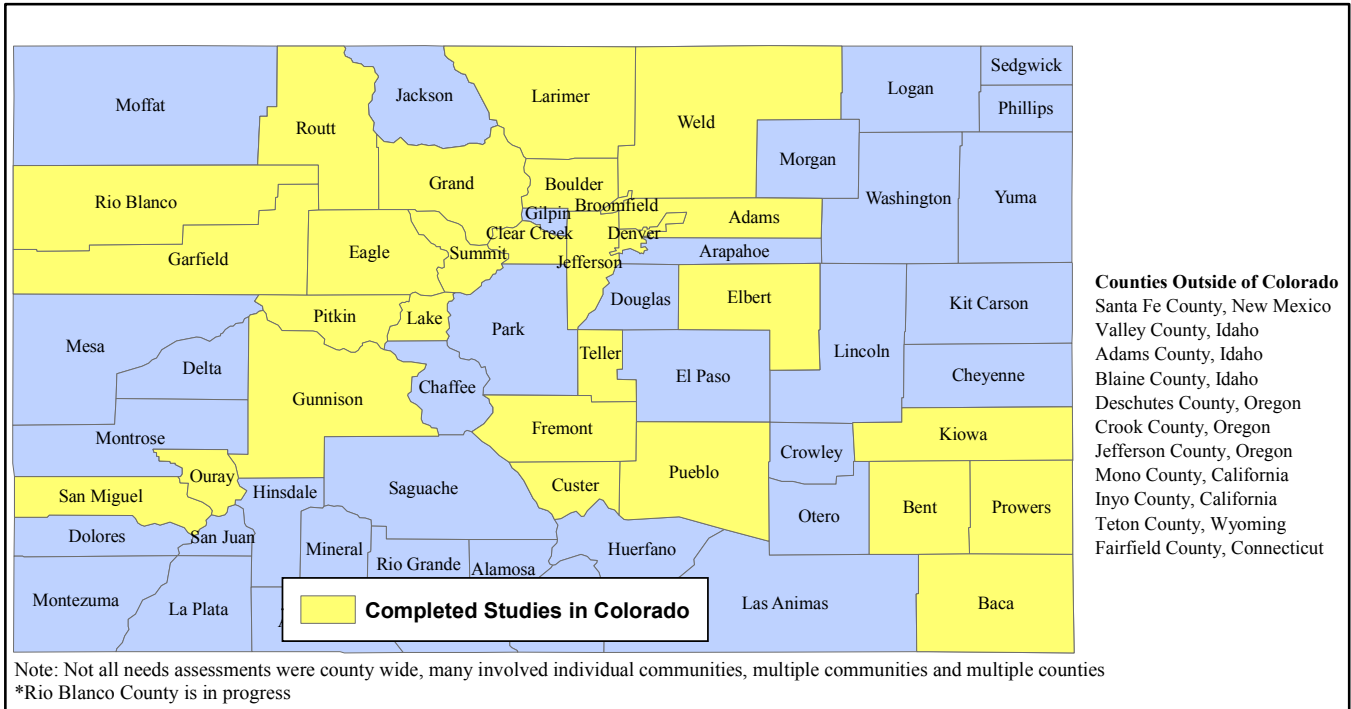
Complete resumes for team members are included in Appendix A.

Experience

RRC Associates and Rees Consulting have completed numerous city, countywide and regional housing needs assessments and strategies in urban, rural and resort areas throughout the west. We completed our first housing assessment in 1990, one of the first in Colorado. Since then we have continued to work with many communities over the years as their needs have changed. We provided extensive input into the Colorado Needs Assessment template and are very familiar with the process. Over time, the scope of our work has evolved from analysis of needs to development of solutions. We are proud of our ability to serve so many repeat clients and to adapt to their changing needs over the years.

The map below highlights counties in which members of our team have completed Needs Assessments or Housing Strategies. Not all assessments were countywide, many involved individual communities, multiple communities and multiple counties. A more complete list of the housing needs assessments we have conducted is in Appendix A.

Counties in Which Members of Our Team Have Completed Needs Assessments or Housing Strategies



Relevant Studies and References for RRC Associates, Inc.

RRC has worked on numerous projects in San Miguel County over the years. We helped write the first comprehensive plan for Telluride in 1986 and subsequently assisted in updating it in 2006. We have conducted multiple summer and visitor research efforts across the county, as well as multiple open space and recreation studies. Over the past three years we have conducted three survey-based projects in San Miguel County that involved household surveys similar to what we propose for this needs assessment. We have also completed a number of housing related studies for the county, starting in 1993. These have included needs assessments and other evaluations that have addressed housing issues.

Over time our team has not only conducted needs assessments but also various strategic and policy oriented studies that draw on housing data. As a result we are particularly versed in collecting data and portraying the situation, but also recommending actions and next steps to address identified needs.

We have drafted carefully conceived housing strategies for multiple municipalities and counties that have led to the adoption of programs and the production of affordable units. We have helped communities prioritize their options and put them into place. We are action oriented and well versed in all of the major aspects of workforce housing, from understanding needs to unit design.

Recently, Melanie Rees completed an Affordable Housing Action Plan for Ouray County. The plan is intended to guide the multi-Jurisdictional work of the newly formed Ouray County Housing Authority and the cooperative, coordinated efforts of the City of Ouray, Town of Ridgway and Ouray County.

All studies listed below were completed within the proposed budget and on time.

Eagle County (2007,2008)

RRC Associates and Rees Consulting have had a long relationship with Eagle County conducting needs assessments in 1992, 1999 and 2001. In 2007, our team completed another needs assessment for the county, this time focusing on several key issues with a focus on solving long-recognized problems. This led to an update of the nexus analysis report we initially prepared in 2005. When the County's efforts to increase their affordable housing requirements were stalled, due primarily to the way in which they were drafted, we re-wrote their affordable housing regulations, guidelines and administrative procedures, and presented them to the BoCC at public hearings. The new regulations were subsequently approved.

Contact:

Alex Potente
Managing Director
970/328-8770

Ouray County Housing Strategy (2009)

Rees Consulting, in team with RRC Associates, were hired by Ouray County to complete an Action Plan intended to guide the work of the newly formed Ouray County Multi Jurisdictional Housing Authority and the cooperative, coordinated efforts of the City of Ouray, Town of Ridgway and Ouray County. Melanie Rees was the lead on the team. The process involved: a critique and update to the 2008 Needs Assessment completed by EPS; development of policies, goals and quantifiable objectives; strategy identification and prioritization; development of administrative guidelines; and, recommendations for a detailed work program. The study resulted in a comprehensive, multi-faceted approach to the provision of affordable housing in which responsibility is broadly shared, and therefore both politically acceptable and defensible.

Contact:

Jennifer Coates
Town of Ridgway Planner
970/626-5308

Summit County Housing Studies (Colorado 2001, 2005, 2006 and 2007)

RRC Associates and Rees Consulting have had a long relationship with Summit County conducting needs assessments in 2001 and 2005. Upon passage of an innovative sales tax (building permit fee) ordinance, the Summit County Housing Authority hired RRC to conduct a survey-based demand study in 2007. The study was intended to help Summit County and its communities target their housing programs and development in the future in terms of locations, types, amenities and price points. The research built off of the 2005 Summit County Housing Needs Assessment Update and 2006 Nexus Study. The study had lead to a county-wide inventory of land potentially available for housing development, which is currently under way. Additionally, the

Town's of Breckenridge, Frisco and Silverthorne have used the study to support community-specific programs and efforts.

Contact:

Jennifer Kermode
Executive Director, Summit Combined Housing Authority
970/423-7043

Routt County and City of Steamboat Springs (2003, 2006 and 2007)

RRC Associates and Rees Consulting completed a countywide needs assessment in 2003, which led to the adoption in 2004 of a community plan for the City of Steamboat with 18 strategies for community housing. As part of the community plan process, we conducted a series of work sessions with the Steamboat City Council to establish quantitative goals and objectives for housing development, and draft commercial and linkage requirements. We provided a Nexus Report so support the linkage requirements. Additionally, we facilitated discussions between the City Council and the Regional Housing Authority on roles, responsibilities and financing.

Contact:

Tom Leeson
Planning Director, City of Steamboat Springs
970/871-8244

Additional experience:

Other areas where we have completed housing related studies include:

- Eagle County, Colorado: 1990, 1996 and 1999/ 2001/ 2002/ 2005/ 2007 (Vail and Towns of Eagle, Gypsum and Avon)
- Summit County, Colorado: 1990, 2001, 2004, 2007 (Including Breckenridge, Silverthorne and Copper Mountain)
- Garfield County, Colorado: 2001, 2004, 2005 (Multiple studies: Assessed impact of housing demand on the County from Aspen; evaluated local transportation usage patterns and planning; performed housing nexus study and review of current regulations)
- Teton County, Wyoming: 2000, 2001, 2005 (Teton County and communities - job generation study (2000), planning and community research (2001), housing needs assessment survey (2005))
- Routt County, Colorado: 1994 and 2003 (Steamboat Springs, Hayden and Oak Creek)
- Blaine County, Idaho: 1994, 2003 and 2006 (Ketchum, Sun Valley, Hailey, Bellevue)
- Central Oregon: 2000 and 2003 (counties of Deschutes, Crook and Jefferson with communities of Bend, Redmond, Sisters, Madras, Prineville and the Warm Springs Reservation)
- Clear Creek County, Colorado: 1996 and 2002 (Georgetown, Idaho Springs)
- Grand County, Colorado: 1992 and 2001 (Winter Park Resort, Tabernash, Grand Lake)
- Gunnison County, Colorado: 1992 and 1999 (Crested Butte, Gunnison and Mt. Crested Butte)

B. Approach

Our proposed approach is designed to build upon existing informational resources and provide new information to inform a set of housing strategies for the county. We anticipate addressing all of the elements of the CDOH Needs Assessment Template, as identified in the RFP. As a result of several recent projects that we have completed, and through active participation in discussions with representatives of CDOH and other consultants, we are very familiar with these guidelines and we are confident that we can successfully incorporate them into the San Miguel and Ouray County work. In addition to addressing the requirements of the CDOH template, we recognize that an important element of this study will be to quantify commuting patterns within the region and to determine commuter impacts as they relate to housing and employment. We have paid particular attention to this in our proposal as well as the desire for the counties to have a model to test employee absorption scenarios and a needs assessment update process.

We feel that the success of this project will in part depend on the participation of the local communities and propose to make ourselves very visible and available throughout the process. We anticipate working with the housing authority, town staff's and other interested parties to identify representatives of the business, educational, non-profit/service sector and elected officials who will be important to interview and to be involved in testing the recommendations that result from this work. We are also proposing to develop a project website where we will post data gathered, provide access to surveys and welcome input on the study.

As described below, we will use available public information; realtor, property management, social service and other key informant interviews; employer and commuter surveys; intercept surveys; phone surveys and available local sources of information (e.g., County Assessor, planning and building departments, etc.) to obtain information about housing needs in the county. We will also utilize previous reports and studies issued.

Primary Research

Our proposed scope of work relies heavily upon primary research including surveys and interviews. These research methods will provide more detailed information on local housing problems, employment patterns, preferences and perceptions than is available through existing data sources. In our experience, surveys are the best and most complete source for quantitative up-to-date information on incomes, housing affordability, public opinions and desires, housing product preferences and the impacts of housing on private businesses and public-sector employers. Further, by surveying a large number of households, we will have the ability to augment some of the data that otherwise would be unavailable at the community level.

RRC Associates will administer the surveys and analyze the data, providing the added benefit of having a housing specialist with complete access to the data throughout the process. We are very experienced in survey implementation and analysis and are adept at applying the data to further support findings and recommendations. At the end of the study we will provide you with a binder of survey runs and cross tabulations for future reference. We can also be available to you in the future if you require additional survey runs or analysis.

Resident Household Characteristics

We propose a household survey to fully understand housing needs and demand generated at all income levels within the county. The survey will contain questions probing demographics of residents, their respective current housing conditions (affordability, satisfaction levels, overcrowding, substandard conditions, distance from work, etc.), and housing preferences for future development (renters that want to buy, owners searching for a new home, senior programs, etc.). Surveys will provide information on types of housing in demand, price points, locations, amenities and trade-offs required to design and develop housing projects that are responsive to needs. In addition, specific policy-related questions that will be helpful in creating the Action Plan can be included. The household survey will be tracked to enable geocoding and mapping of the results. The tracking will also allow us to monitor duplicate responses from the other outreach efforts described below.

We propose to distribute the household survey through a combination of methods including by mail, by hanging on the doors at apartment properties to increase response rates among renters, on the project website and through employers. We suggest that a meaningful incentive be offered to survey participants, such as gift certificates for groceries, to encourage participation from all types of households. Incentives have proven to be very effective when offered in other areas. We anticipate a response rate of between 15 and 25 percent and potentially higher depending on the amount of publicity about the study.

Employer Survey

We propose to conduct a survey of local employers. The employer survey will quantify housing-related problems with employee recruitment and retention (unfilled jobs, tardiness, absenteeism, unqualified workers, and language barriers) and plans to increase or decrease positions in the future. The types of positions and types of employers most affected will be analyzed. The survey will also be used to collect information on housing units or assistance now provided to employees and willingness to help employees in the future find and acquire housing. Quantitative information on how housing costs and availability are impacting employers is powerful when trying to get solutions implemented.

The employer survey will also provide strategic data on both employer and employee needs and will offer important information on some of the economic development issues associated with available housing in the region. Additionally, we propose to include questions on the employer survey that will assist us in quantifying the employee population speaking a language other than English that may have special housing solutions as a result of unique household characteristics.

We propose to offer the employer survey as both a web-based version distributed through email and as a written version mailed or faxed to employers who have limited access to or interest in the web version. We propose to personally contact the top 20 employers in the region to encourage their participation. One of the benefits of a region with small economically interconnected communities is that person-to-person contact is made easier. Often the most useful data comes from this type of interaction.

One of the benefits of the employer survey is that it will provide a means of bringing an “opted in” group of employers into the process. They can later be re-contacted by email as part of the public outreach effort for this study. We have used this type of survey with excellent success in other Colorado counties.

Employee Survey

We also propose to conduct an employee survey, which will reach in-commuting employees. It will be distributed through employers and will identify the characteristics of these households, including their types of employment and salary, housing costs, reasons for choosing their place and type of residence, interest in living in different communities permanently if housing was available, interest in finding a job located closer to their current place of residence, housing preferences and needs and costs related to commuting. Spanish versions of in-commuting surveys will also be provided.

We propose to offer the employee survey as both a web-based version distributed through email and as a written version provided to employees who have limited access to or interest in the web version.

Additional Outreach to Address Commuters

Intercept Surveys

Intercept surveys will be geared towards those workers who do not live in the county, but will also serve as another means to reach those commuting within the county. We propose an abbreviated survey of the household and employee survey, which would include an option to opt-in for follow up research or to complete the long form. The survey will contain key demographic, household and economic questions. It can be filled out on the spot, returned with the pre-paid stamp, or dropped off at a specified location. This will be a hands-on effort.

Radio

Another means of reaching commuting employees is through KOTO. Commuters spend a lot of time in their cars, in the office or on the job site listening to the radio. We propose to work with KOTO to provide an announcement that would give a toll free number to call and answer a short survey to be entered into a prize drawing. The survey would be the same as the intercept survey. RRC would provide the phone number and the answering service. We would ask that the committee help identify a prize that would be an appropriate incentive. Incentives we have used in the past include gas cards and grocery certificates.

Local Realtor and Property Manager Interviews

Local realtor and rental property manager interviews will be conducted to obtain information on both the ownership and rental markets including current prices, recent trends, occupancy patterns, availability and what households are seeking when looking to purchase or rent a unit. We will also seek insights about the influence of retirees and seasonal/temporary workers on the market. These interviews will help define housing preferences in the area, including unit type, bedrooms, size, locations and amenities. These will be a combination of in-person and phone interviews depending upon the availability of contacts.

Needs Assessment

The following discussion summarizes the major components of the proposed Housing Needs Assessment. These topics will be addressed in statistical charts/graphs and written format, as appropriate.

Economic and Demographic Framework

We will provide estimates of current population, housing units, households and employment as well as projections for each through 2015. We will provide information on the number of residents that live and work in the area, including the types of jobs in which they are employed, their location of employment and their average household incomes. Information on the geographic and economic characteristics of the area will be obtained from the survey effort, Quarterly Census of Employment and Wages, the Department of Local Affairs, area planning departments, land-use maps and other local information. We find that GIS is a useful tool in countywide studies to estimate employment, housing units and population by county sub-areas and towns.

Commuting patterns will be an important element in this section. We have proposed an extensive survey outreach effort, particularly in light of obtaining accurate and thorough information on the commuter population. Survey data will be compared to the US Census 2000 data and to 2006 Local Employment Dynamics data to determine where workers live, as well as where residents work. These estimates will assist us in defining the impacts of the commuter population in the region and adjacent communities. An analysis of the jobs/housing balance will be included in this section.

Housing and Land Inventory

We will describe the housing inventory using a combination of information from the surveys, past studies, building permits, and Assessor's Data. It will include information on the age, condition, type, size of units and ownership of units. We will gather information about planned development in the area from the Planning Departments. A map by unit value and ownership will be created from this effort. Employment and demographic characteristics gathered from the previous section will be included on the map to gain an understanding of the spatial relationship between housing, economic and demographic characteristics across the region.

Housing Market Analysis

A combination of Assessor data, multiple listing service data, sales data from Judy Kiernan, and realtor interviews will be used to analyze homeownership market conditions, including historic and current home prices and the availability of homes by price and income. Additionally, survey data as well as data gathered from property manager interviews will be used to complete a rental market analysis. This analysis will describe the inventory of rental units, the rents charged and vacancy rates.

Housing Problems and Special Needs Housing

We will examine standard indicators of housing problems including satisfaction levels and reasons for dissatisfaction with housing, affordability, foreclosures, overcrowding, forced commuting, employer perceptions as to the extent of the workforce housing problem, and problems that employers are experiencing directly related to housing, like inability to fill jobs.

Additionally, in accordance with Division of Housing specifications, we will examine the housing-related needs of specific population groups in the region, including seniors, Spanish-speaking employees, migrant workers, victims of domestic violence, homeless persons and very low-income households.

Housing Gaps and Estimated Need

We will estimate the total number of housing units needed by residents, both to fill existing gaps in the market and to accommodate future needs based on population and employment growth projections through 2015. The demand for additional employee housing is estimated using a combination of factors – unfilled jobs, overcrowding, in-commuting, replacement of retiring employees and growth in new jobs.

The housing supply will be compared to the demand for housing to identify any gaps in the availability of housing in different price points, sizes and type categories based on household Area Median Income (AMI).

Executive Summary

Key findings from each section of the report will be summarized in the executive summary. We have found that the executive summary can be a very useful tool to use when discussing and implementing recommendations from the study. The summary will be designed to serve as a stand-alone document for those that don't have the time or the interest in reading the full Needs Assessment.

Action Plan

The following components provide support for the development and enhancement of action plans, which are essential in translating data from the needs assessment into goals and actionable priorities. Our recent focus, in addition to developing thorough and well-documented housing needs assessments, has been on helping communities use the needs assessment and the action plan to develop Strategic Housing Plans. We have drafted carefully conceived housing strategies for multiple municipalities and counties that have led to the adoption of programs and the production of affordable units. We have helped communities prioritize their options and put them into place. We are action oriented and well versed in all of the major aspects of workforce housing, from understanding needs to unit design.

Model for Absorption Scenarios

We propose to create an Excel-based model for each county to quantify the possible outcomes of various future development scenarios. Output from the model will inform and support future decisions on policies, resource allocation, regulatory change and program modifications. The model would incorporate variables on rate of growth, employee housing linkage/mitigation rates, inclusionary zoning, density, household composition and bedroom mix. Our methodology would include consideration of historic trends and growth projections and would include assumptions based on data from the proposed surveys. We would design the model so as to generate multiple scenarios based on direction by the task force.

We have found in other communities that this is a key step needed for implementation. It allows decision makers to see the difference that the adjustment of variables makes on the number of units produced, and on the potential cost to both public and private developers. Trade offs can be weighed and direction adjusted to reach desired targets.

Design and Development

Data from the surveys will be used to identify housing preferences among owners that want to buy a different home, renters looking to buy their first home, and the needs of households that prefer (or can only afford) to rent. This section will help target the types of units, size of units (bedrooms) and amenities desired. With adequate survey responses, we anticipate identifying housing needs by AMI range, indicating the demographic mix and associated housing preferences by household income and, hence, affordable housing price ranges.

Employer Support

We proposed that the Employer Survey include questions asking for input on what they feel should be done about housing in the region, what they would be willing to vote for and what they have the capacity and willingness to do themselves. We feel it is important to explore opportunities for Employer-Assisted Housing (EAH) in depth.

Updates

We understand that the counties would like to develop a means for the region to keep the housing needs assessment up to date in order to continue to strategically plan housing needs throughout the region. We propose to identify key indicators that can be monitored and updated on a yearly basis. Data for these indicators would be from publicly available sources. We would provide the counties with spreadsheets for the models and the estimates of needs. These spreadsheets would be formatted to easily allow updates to the key indicators, which would in turn adjust the results of the model and the estimate of needs.

In addition to the yearly key indicator update, we suggest a full household and employer survey every 3 to 5 years. It is important to consider that secondary data have limitations, especially when measuring smaller populations. Primary research is the best way to get up to date accurate information at the community and county-wide level. The 2010 US Census will not have the long form, only the short form. The long-form has been replaced by the American Community Survey (ACS). ACS data for San Miguel County will be available next year, when five-year estimates will be released. These estimates will be based on data collected over a 5-year period of time and therefore they will describe the average characteristics for that 5-year time period. In places like San Miguel County and Ouray County, a lot can change in 5 years and this data cannot be guaranteed reliable. Thus it will be important to measure local conditions and to update the full needs assessment with primary research periodically.

Work Sessions and Public Participation

We will make no less than four trips to the region to facilitate work sessions, conduct key informant interviews and to present report findings.

Identification of Regional Task Force

We will work with stakeholders in the process, including the Housing Authorities and town staffs to identify participants for the regional task force. The task force will assist in publicizing the research effort, survey design and development and draft reviewing. They will serve as a sounding board for findings and conclusions and will assist in development of the action plan. While we feel it is important to have a broad range of public participation, we suggest identifying one person who will be our main point of contact throughout the project.

Work Session #1

Early in the process we will hold an interactive meeting with Housing Authority staffs and the regional task force. The meeting will be used to refine the project scope and draft the questions that will be the most beneficial for use in the surveys and key informant interviews. Persons and/or organizations and businesses to be interviewed as part of the key informant surveys will also be identified.

Extended Stay

We feel it will be important to encourage public participation and to make ourselves available to the communities through the needs assessment process. One to two months into the project we will travel to the region for an extended stay (one week). During this time we will conduct key informant interviews, intercept surveys, door hanging and employer survey follow-ups.

We find that in many situations, conducting the key informant interviews in one-on-one meetings allows the interviewee to be more candid about their opinions and knowledge of issues related to housing needs. However, it can sometimes be useful to gather people of similar backgrounds to foster conversation among

groups and to gather qualitative information. We are adept at holding and facilitating group format meetings (“focus groups”), and while we do not feel they should be held in lieu of survey research, they can complement survey research. RRC Associates owns and operates the Boulder Focus Center, which is a comprehensive qualitative market research facility, located in Boulder, Colorado; group format meetings are a particular area of specialization of our team. We propose to provide group format meetings as an option to supplement the key informant interviews if this approach is considered appropriate by the taskforce.

Work Session #2

Upon completion of the draft housing assessment, we will host a work session with staff and the regional task force to present the initial findings. The purpose of working with this group is to discuss the implications of the findings, including various recommendations and implementation strategies. We will provide the initial series of recommendations based on information from the housing assessment and our knowledge of “best practices”. From this work, an action plan that describes the major tasks to be undertaken along with a series of recommendations will be prepared. The action plan will outline next steps for the County and City Government’s to move forward in addressing the housing issues identified by the Needs Assessment and provide an educational framework from which strategies can be understood and assessed in light of regional needs and preferences.

Final Presentations

We anticipate making an oral summary of the completed study before policy makers in each county. We will define a mutually agreeable schedule for hosting this session with the participating agencies.

Additional Public Outreach Tools

- Announcements and press releases – we will be available to assist in the production of electronic press releases and display advertisements/announcements for local newspapers and newsletters.
- Surveys – in addition to survey responses, open-ended questions will be included to gain further input from community members on their specific housing situation and needs. We will be able to segment opinions by residents, business owners, seniors etc. Further, as a result of the survey, we will have an extensive list of “opted-in” individuals (those that have expressed interest in participating) that can be tapped for input and contacted with information about the process.
- Web site and links – we will create an interactive website including text, diagrams, and photographs. Web links will appear on all planning materials.

Assistance from Staff

Staff may assist the research effort by providing the following services:

- Assist with obtaining county assessor and sales data.
- Help identifying contacts and arranging key informant interviews.
- Coordinate publicity about the study in order to obtain cooperation and maximize survey response rates.
- Provide meeting space and refreshments as appropriate.

Final Report Format

The format of our report will conform to the Colorado Division of Housing guidelines for housing needs assessments. We will generally organize our report to follow the Template although there will be some deviations as a result of presenting data obtained through the surveying process. We understand that housing needs are quite different for each town as well as the land outside town limits and have provided options in the budget for segmenting the information.

We will provide the report in hard copy and electronic versions suitable for reproduction, posting on a web site, and inserting into reports for submission to HUD and other funding agencies. Spreadsheets created to compile locally generated data, like Assessor records and MLS listings, will also be provided as will our statistical tabulations.

C. Considerations for a Multi-County Needs Assessment

Regional Taskforce. With a multi-county study, it is important to have representatives from both counties and each of the towns centrally involved. We have identified this group in the proposal as the ‘Regional taskforce’. This group will be our central contact and will provide efficiencies in moving the project forward and making sure all interests are represented. It will be important that this group is representative of the region.

Subarea Reporting. We have found with regional studies involving multiple counties that the data is most useful when it is broken out by county at a minimum, and in many cases by community. While we understand that Ouray and San Miguel Counties function as a region, policy needs to be able to follow political boundaries. Reporting data and calculating demand estimates by community and county adds complication and additional analysis. The detail of individual community analysis can vary, depending on your needs and budget.

Stakeholder Interviews. A multi-county study requires additional stakeholder interviews and travel costs. We suggest working with the taskforce to identify key stakeholders and where possible, conducting group interviews to limit the amount of time and budget.

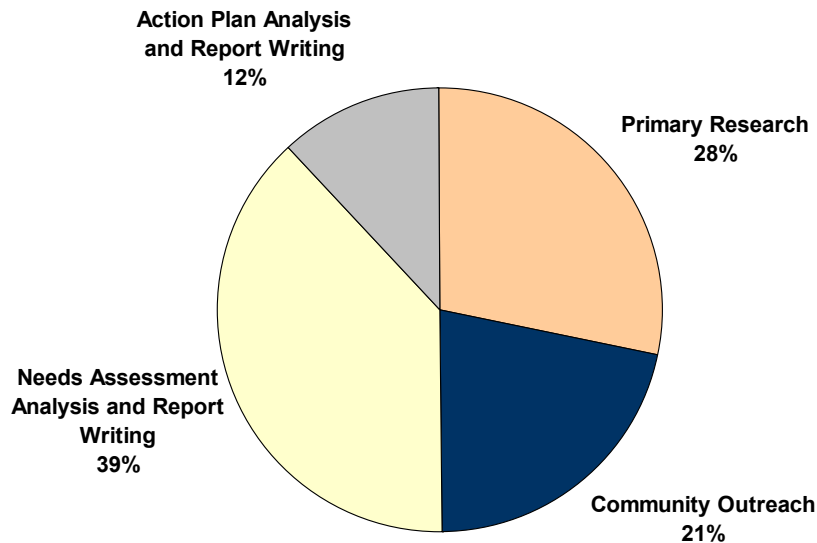
D. Costs

We propose a fee not to exceed \$70,500 based on the scope of services as proposed. We have provided separate line items for our research tasks and for each major section of the report so that the scope and methodology may be modified as needed in response to priorities and resource availability. Below we have summarized our estimate of the project budget.

Primary Research	Original Budget	Updated Budget
<i>Household and Employee Survey</i> – design, set up, distribution and statistical tabulations	\$10,000	\$12,000
<i>Intercept Survey</i> – design, set up, distribution and statistical tabulations	\$2,000	\$3,000
<i>KOTO Phone Survey</i> – design, set up, distribution and statistical tabulations	\$1,000	\$1,000
<i>Employer Survey</i> – design, set up, data entry, and statistical tabulations for web-based surveys.	\$3,500	\$4,000
<i>Subtotal</i>	\$16,500	\$20,000
Community Outreach		
Work sessions, extended stay, final presentations, website set-up and management, travel time	\$9,000	\$10,000
<i>Key Informant Interviews</i> – 20 interviews averaging 1.5 hours per interview w/ follow up, optional group format meetings	\$5,000	\$5,000
<i>Subtotal</i>	\$14,000	\$15,000
Needs Assessment Analysis and Report Writing		
<i>Demographic and Economic Framework</i> –key demographic & economic characteristics including commuting	\$3,000	\$3,500
<i>Housing Inventory</i> – number of units by type, age, condition, occupancy/use, trends in ownership, affordable/deed restricted units	\$2,000	\$2,500
<i>Homeownership Market Analysis</i> –ownership trends, sales prices, listings, pipeline projects, units at risk	\$2,500	\$3,500
<i>Rental Market Analysis</i> – current market-rate rents and vacancy rates by number of bedrooms, subsidized inventory, units at risk	\$2,500	\$3,500
<i>Housing Problems</i> – cost burden, overcrowding, substandard conditions by own/rent	\$2,000	\$3,000
<i>Special Needs</i> – homeless, elderly, disabled and employees with limited English skills	\$2,000	\$3,000
<i>Housing Gaps and Estimate of Need</i> – estimates of net demand by AMI, present and forecasted.	\$3,000	\$5,000
<i>Key Findings and Conclusions</i> – also functions as an executive summary	\$2,000	\$3,000
<i>Subtotal</i>	\$19,000	\$27,000
Action Plan Analysis and Report Writing		
<i>Public opinions about strategies</i> – analysis of opinions gathered through surveys, interviews and work sessions	\$1,000	\$1,500
<i>Model</i> - model to test employee absorption scenarios	\$2,000	\$3,000
<i>Design and Development</i> -housing product preferences	\$3,000	\$4,000
<i>Subtotal</i>	\$6,000	\$8,500
Total “not to exceed” suggested budget	\$55,500	\$70,500

Below is a chart demonstrating the distribution of budget by category. The largest percent of the budget, 39%, is allocated to the Needs Assessment data analysis, report writing and key findings and conclusions. Primary research makes up the second largest component. This is a very important element of the proposal. Obtaining accurate up to date information will result in a needs analysis and action plan that will be applicable to the county and each community within. The community outreach effort (surveys, interviews), 21% of the budget, will be an ongoing process throughout the project. It will provide key information for both the needs assessment and the action plan. As mentioned previously, we feel it will be important to be visible, to gather input from multiple businesses, stakeholders, non-profits and citizens and to create buy-in which will produce more actionable results. Finally, 12% of the budget is allocated to the analysis of the components that supports the development of an Action Plan, the design of specific projects and the development/refinement of strategies like inclusionary zoning.

Distribution of Budget by Category



Optional Analysis

The estimate of demand provides budget for calculating housing gaps and need by County, but not by each individual community. Calculating demand by AMI for each community (Telluride, Mountain Village, Norwood, Ridgway and Ouray) in addition to the counties would add \$3,500 to the budget. However, the budget does include an analysis of survey data, housing market data and jobs and commuting by community.

While the schedule calls for completion by June, which allows ample time, it does not provide for research on commuting during the summer. We suggest you consider that in-commuter survey efforts be repeated during the summer when the number and type of employees who commute is somewhat different. The additional cost for this would be \$5,000.

Our hourly billing rates are provided below.

	Non-Profit Hourly Rate
Chris Cares, RRC Principal	\$165
Melanie Rees, Principal Rees Consulting	\$150
Sarah McClain, RRC Research Analyst	\$80
RRC Data Entry/Tabulations/Support staff	\$45-\$60

E. Project Schedule

Based on the schedule provided, we would begin in January. We would spend January collecting baseline data (population, employment, housing units, etc.), designing the surveys and questionnaires, identifying contacts, organizing survey distribution and conducting a reconnaissance visit. Key informant interviews will be conducted when the surveys are in the field. Data entry would be completed by the end of February, followed by analysis and report-drafting period. The initial draft of the report could then be ready for review at the second work session in early March. The Action Plan and the final report would be completed by the end of March and the final presentation would be completed by the end the ski season. Ongoing project updates will occur through written and verbal communication on a biweekly basis.

If the budget and timeline permit, we recommend that consideration be given to also surveying commuters during the summer months due to seasonal variation in job counts, job types and presumably commuting patterns.

Proposed Timeline

	January				February				March				Apr
Week	1	2	3	4	1	2	3	4	1	2	3	4	1
Secondary data collection	x	x	x	x									
Work session #1			x										
Identify employers			x	x									
Survey design				x	x								
Survey distribution and collection					x	x	x	x					
Extended Stay						x							
Key Informant Interviews						x	x	x					
Analysis and initial report draft								x	x	x			
Work session #2										x			
Action Plan										x	x	x	
Final report and presentation												x	x

Appendix A – Additional Information

C. CHRIS CARES AICP

RRC ASSOCIATES ♦ 4940 PEARL EAST CIRCLE ♦ BOULDER, CO 80301 ♦ 303.449.6558 ♦ FAX 303.449.6587 ♦
chris@rrcassoc.com

Chris possesses a diverse background in public and private planning, with a specialization in housing issues. A founding partner of RRC Associates, he often focuses on practical applications of research techniques including survey research, and statistical analysis for problem solving in city planning, housing policy development and a variety of business applications. His research and recommendations have helped to shape both the design and marketing strategies of affordable housing developments, towns and resorts. He has coordinated the evaluation and planning of numerous housing and mixed-use developments, and research and policy evaluation related to housing needs assessments and market studies are a particular area of specialization. Chris has also drafted comprehensive plans, zoning and housing ordinances, growth management plans, and related regulations for towns and cities of various sizes.

PROFESSIONAL EXPERIENCE AND REPRESENTATIVE PROJECTS

1983 to present PRINCIPAL
RRC ASSOCIATES, INC.
(ROSALL REMMEN CARES)

*RRC Associates, Inc.
Principal-in-charge of:*

A series of County Needs Assessments addressing housing and transportation issues. Studies for Eagle, Grand, Gunnison, Routt, Summit, San Miguel, Pitkin, Garfield (CO), and Blaine (ID) counties; City of Carson City, NV; City of Pueblo, CO; Town of Avon, CO. In addition, participated as a team member on similar studies in: Weld County, Adams County, Elbert County, Lafayette, Longmont, Westminster and Boulder. All studies involved survey research as well as policy analysis.

PROFESSIONAL HISTORY

1981 ASSOCIATE
Gage Davis Associates—Boulder, CO
Associate

Eagle County Housing Needs Assessment,
Draft Ordinance and Guidelines (2001)
Eagle County Department of
Community Development

1979 PLANNER
Gage Davis Associates—Boulder, CO
Project manager

City of Westminster Housing
Needs Assessment
City of Westminster Department
of Community Development

1976 PLANNER
City of Boulder—Boulder, CO

1975 PLANNER
Lincoln-Uinta Counties Planning
Office
Kemmerer, WY

1974 RESEARCH ASSISTANT
Harvard University

Elbert County Housing Needs Assessment
(2002)

(continued)

C. CHRIS CARES AICP

RRC ASSOCIATES ♦ 4940 PEARL EAST CIRCLE ♦ BOULDER, CO 80301 ♦ 303.449.6558 ♦ FAX 303.449.6587 ♦
chris@rrcassoc.com

Colorado Indicators Project – Produced
“The Colorado Index – Understanding
and Tracking Quality of Life” for the
Colorado Center for Healthy
Communities

“Pop-ups and Scrape-offs” Evaluation
(a qualitative research study of the
impacts of large homes and major
renovations on neighborhood scale
and character—Boulder, CO

Public participation processes for a variety
of communities and situations including
Broomfield, Avon, Vail, Breckenridge,
Pueblo, and Frisco, CO

Vail Commons (City Market) Public Private
Partnerships, Middle Creek Market Study,
Timber Ridge Market Evaluation (Multiple
studies for Vail concerning affordable
housing issues and opportunities)

Town of Vail/Vail Associates Joint Task
Force Facilitation (A community task
force effort designed to examine and
monitor a variety of issues impacting
the Town)—Vail, CO

Girdwood, Alaska Land Use Regulations
Update

Boulder Economic Base Study
(City of Boulder/Boulder Chamber
of Commerce Joint Effort)

Telluride Growth Study

Telluride Master Plan

Upper Blue River Master Plan
Breckenridge, CO

Pueblo Tourism Base Study and Affordable
Housing Studies

EDUCATION

Master of City Planning
Harvard University, 1975

Bachelor of Arts, Political Science
University of Rochester, 1972

University of Michigan, 1971

PROFESSIONAL / OTHER ORGANIZATIONS

American Planning Association
AICP certified

Travel and Tourism Research Association

Breckenridge Outdoor Education Center—
Board Member

SARAH G. McCLAIN AICP

RRC ASSOCIATES ♦ 4940 PEARL EAST CIRCLE ♦ BOULDER, COLORADO 80301 ♦ 303.449.6558 ♦ www.rrcassoc.com

Sarah brings to RRC a broad range of skills, including physical planning, community planning and survey research. With an educational background in urban and regional planning, she has an understanding of how to measure growth's effect on local and regional economies, to manage social benefits and shape growth's imprint on the physical landscape. Sarah's employment with the Colorado Center for Community Development has provided her with valuable survey research and planning experience with many small communities across the state. As a native of Telluride, Colorado, she offers a unique perspective of resort communities and the ski industry. Sarah's employment with RRC has emphasized research on affordable housing needs and demand, housing market studies, tourism research, and related fields for public, private, and non-profit sector clients.

EDUCATION

Master of Urban and Regional Planning
Focus: Economic & Community Development
University of Colorado at Denver, 2006

Bachelor of Arts, Environmental Studies
Focus: Environmental Policy
University of Colorado, 1999

PROFESSIONAL EXPERIENCE AND REPRESENTATIVE PROJECTS

2006 to present PLANNER ANALYST
RRC Associates
Boulder, CO

Town of Silverthorne, CO
Strategic Housing Plan

Town of Estes Park, CO
Housing Needs Assessment

Santa Fe County, NM
Housing Needs Assessment

Grand Junction, CO
Comprehensive Plan

Summit County, CO
Housing Demand Study

Eagle County, CO
Housing Needs Assessment

Copper Mountain, CO
PUD Housing Requirements

Aspen Skiing, CO
Market Research Analysis

City of Bridgeport, CT
Housing Needs Assessment

2005 to 2006 PLANNER
Colorado Center for Community
Development
Denver, CO

Performed long and short term rural planning; prepared and presented planning documents. Specific research projects included: comprehensive plan review, comprehensive trends analysis, recreation survey and building study, Scenic Byway survey development program, tourism intercept surveys.

2000 to present CEO,
FOUNDING MEMBER
Telluride Technology Festival
Telluride, CO

Work directly with the Board of Directors to plan, schedule, advertise and run the festival.

PROFESSIONAL ORGANIZATIONS

American Planning Association- AICP certified
Housing Colorado
CU Boulder Alumni Association

Melanie Rees
Rees Consulting, Inc.

During the past 18 years, Melanie Rees has become an expert in affordable housing in high-cost areas including Denver's downtown area, Boulder and Colorado's mountain resort communities. Her firm is recognized as an industry leader in housing market studies and needs assessments. Her clients have included private and non-profit developers, public housing authorities and local governments.

Professional Experience and Representative Projects

Principal
Rees Consulting, Inc.
1991 - Present

The firm concentrates on housing needs assessment and market studies for affordable housing, and is an approved market analyst for programs administered by the Colorado Housing and Finance Authority and the Colorado Division of Housing. The following are representative samples of the firm's work.

Housing Needs Assessments

Routt County/Steamboat	Summit County	Gunnison County
Eagle County/Vail	Town of Breckenridge	Blaine Co, ID/Sun Valley
San Miguel Co./Telluride	Clear Creek County	Valley Co, ID/McCall
Central Oregon Region	City of Boulder	Boulder/Broomfield Counties

Market Studies -- Apartment and Ownership Projects

Metro Denver/Boulder Region

Florence Square
Premier Lofts
Broadway Plaza Lofts
Highlands' Garden Village
Santa Fe Commons
Denver Dry Goods
Arapahoe Green
Morrison Road Apartments
Clover Basin
Riverwalk/Peak View

West Slope/Mountains

Goeglein Gulch Rd. Apts
Tierra Del Sol
Fox Run @ Winter Park
Breckenridge Terrace
Pinewood Village
Mountain Village
Mercy Housing @ Bayfield
Valley Brook
Villas at the Bluffs
Fire Clay

Miscellaneous

Eagle River Station Housing Impact Analysis	Telluride Liberty Bell Relocation Program
Vail Housing Authority -- Business Plan	Steamboat Springs Housing Plan & Linkage Program
Mt. Crested Butte Inclusionary Housing	Breckenridge Workforce Housing Action Plan
Eagle County Affordable Housing Guidelines	Gunnison County Housing Element

CLIENT LIST

RRC ASSOCIATES ♦ 4940 PEARL EAST CIRCLE ♦ BOULDER, COLORADO 80301 ♦ 303/449-6558 ♦ www.rrcassoc.com

STRATEGIC/MASTER PLANNING, AFFORDABLE HOUSING, TRANSPORTATION, AND RECREATION NEEDS ASSESSMENT STUDIES

Blaine County Housing Studies	Sun Valley/Ketchum, Idaho
Broomfield Connection	Broomfield, Colorado
Carson City Housing Master Plan	Carson City, Nevada
Central Oregon Regional Housing Agency	Redmond, OR
Chaffee County Housing Study	Salida, Colorado
City of Boulder (numerous studies)	Boulder, Colorado
City of Brighton Parks and Recreation	Brighton, Colorado
City of Castle Rock Community Survey	Castle Rock, Colorado
City of Evans Parks and Recreation	Evans, Colorado
City of Girdwood	Girdwood, Alaska
City of Grand Junction Parks and Recreation	Grand Junction, Colorado
City of Grass Valley Housing Study	Grass Valley, California
City of Lafayette Housing Study	Lafayette, Colorado
City of Pueblo Community Survey	Pueblo, Colorado
City of Rio Rancho Parks and Recreation Study	Rio Rancho, New Mexico
City of Steamboat/Routt County Housing Studies	Steamboat Springs, Colorado
Denver Urban Renewal Authority	Denver, Colorado
Douglas County Housing/Growth Mgt Elements	Douglas County, Nevada
Eagle County Housing Studies	Vail/Avon, Colorado
Fraser Valley Metropolitan Recreation District	Fraser/Winter Park, Colorado
Grand County Housing Study	Winter Park/Hot Sulphur Springs, Colorado
Gunnison County Housing Studies	Gunnison, Colorado
Healthy Mountain Communities	Carbondale, Colorado
Homeowner Nexus Studies	Lee County, Monroe County, Collier County, Boca Raton, and Palm Beach City, Florida
Park County Master Plan Survey	Park County Colorado
Pitkin/Garfield County Housing Studies	Aspen, Colorado
Town of Telluride/San Miguel Co. Community Surveys	Telluride, Colorado
Town of Avon	Avon, Colorado
Town of Frisco	Frisco, Colorado
Town of Breckenridge/Summit Co. Community Surveys	Breckenridge, Colorado
Town of Estes Park	Estes Park, Colorado
Town of Vail (numerous studies)	Vail, Colorado
Limon Housing Project	Limon, Colorado
Roaring Fork Transit Agency (RFTA)	Aspen, Colorado
Summit Stage	Breckenridge, Colorado
Weld County Housing Study	Weld County, Colorado

RRC Associates and Rees Consulting

RESEARCH • PLANNING • DESIGN 4940 Pearl East Circle | Boulder, Colorado 80301 | 303.449.6558 | www.rrcassoc.com

Housing Needs Assessments and Strategic Housing Planning

Needs assessments comprehensively examine market conditions and quantify housing problems and opportunities faced by communities or regions. While each is customized to address our client's unique needs, they typically consider housing costs relative to income, housing problems including overcrowding and substandard conditions, the relationship between jobs and workforce housing, existing rental and ownership market conditions, demographics, special needs populations and the impacts of commuting and regional influences on housing demand. Our reports identify opportunities and provide the framework for developing solutions to address quantified needs. In addition, we have worked with many clients to develop strategic housing plans which are tailored to the specific needs of the community or region.

In the past 18 years, RRC and Rees Consulting have completed needs assessments and/or other specialized housing evaluations for the following clients, many of which have utilized our services multiple times to assess needs and potential solutions as they have changed over the years.

Colorado Mountains and Rural Areas

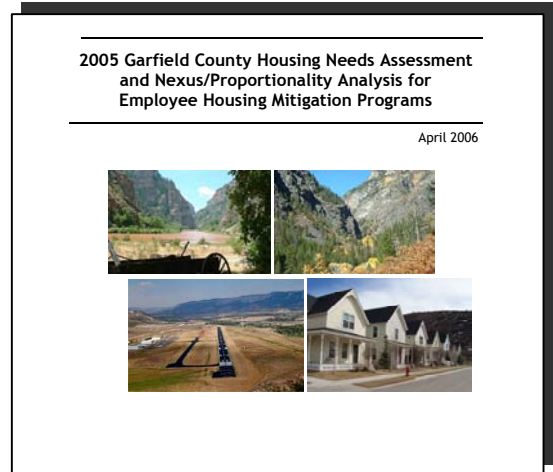
Eagle County and Vail, Avon, Edwards, Eagle and Gypsum
 Summit County and Breckenridge
 Gunnison County with Crested Butte, Mt. Crested Butte and Gunnison
 Clear Creek County with Georgetown and Idaho Springs
 Grand County with Winter Park, Tabernash, Granby and Grand Lake
 Garfield County and Glenwood Springs
 San Miguel County with Telluride and Mountain Village
 Routt County with Steamboat Springs, Hayden and Oak Creek
 Teller County and Cripple Creek, Victor and Woodland Park
 Lake, Custer and Fremont Counties

Colorado Urban Areas

City of Boulder
 Boulder County and Broomfield region with cities of Boulder, Louisville, Longmont, Lafayette, Erie and Superior
 City of Longmont
 Elbert County
 City of Westminster
 City of Broomfield
 Weld County and the City of Greeley

Western States

Santa Fe County and City of Santa Fe, New Mexico
 Valley County and Adams County, Idaho
 Central Oregon Region covering counties of Deschutes, Crook and Jefferson
 Blaine County, Idaho
 Eastern Sierra Region covering Mono and Inyo Counties and cities of Mammoth Lakes and Bishop, California
 Teton County and Jackson, Wyoming



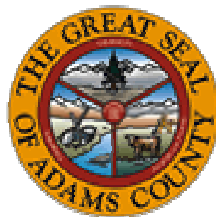
THE NEEDS ASSESSMENT IS DONE - NOW WHAT?
 HOUSING COLORADO NOW!
 October 2, 2007

Presented by:
 Chris Cares, RRC Associates, Inc.
 Cindy Brown, Boulder Housing Partners
 Melanie Rees, Rees Consulting, Inc.
 Ken Brenner, Steamboat Springs City Council

EXAMPLE PROGRAM TOOLS

Program	Description	Communities
Density Bonus	Provides an increase in density to a developer for additional units, if all or part of the increased density is affordable housing.	Arvada, Longmont, Boulder, Glenwood Springs, Greeley, Mesa County, Denver, San Jose
Density Transfer	Transfer density from one site to another. For example, density on property acquired for open space is transferred to another parcel.	Portland, Longmont, Steamboat, Seattle
Annexation Policies	With cooperative policies between the County and local municipalities, towns may require developers who seek annexation to provide a significant amount of affordable housing.	Garfield County, Boulder County
Fee Deferrals or Waivers	Defer payment of fees or sales and use tax until the certificate of occupancy is issued and/or freeze the amount of the fees to the price in place at the time the site plan is reviewed. Some communities will waive a portion of the fees or use taxes for developments that provide housing that meets targeted community goals.	Lafayette, Loveland, Douglas County, Greeley, Longmont, Denver, Douglas County, Fort Collins, San Jose, CA
Accessory Units	Optional, small second units attached to or within single-family units.	Lafayette, Denver, Boulder, Oregon
Inclusionary Zoning Requirements	Requires developers to include or set aside a certain portion of a development as affordable housing. The housing is usually similar to other units in development. The program may allow cash-in-lieu or off-site housing as an option for compliance.	Longmont, Denver, Lafayette, Glenwood Springs, Garfield County, San Miguel County
Linkage (commercial and/or residential)	Requires developers of new commercial or residential properties to pay fees (usually assessed per square foot of development) to support affordable housing. Some programs give developers the option to actually construct the affordable units.	Pitkin County, Telluride, Steamboat Springs, Crested Butte, San Miguel County, Eagle County, Summit County
Community Land Trust	Non-profit organization that owns land in perpetuity and assures units remain affordable over time through the execution of a land lease.	Thistle Community Housing, Lowry Land Trust, Uptown Partnership
Land Banking	Land is purchased or donated well in advance of any development, making the land cost more reasonable in the future. Often this is excess land acquired as part of another purchase, such as parks, schools, or other civic uses.	Used in Boulder County.
Fast Tracking	Provide developments that meet local affordable housing thresholds to receive priority through the review process. Often done on a project specific basis.	Fort Collins, Greeley
Employer Assisted Housing	A variety of methods are used including mortgage subsidies, down payment assistance and/or master leasing of rental units.	Washington Medical Center (St. Louis) Milwaukee, WI, Intermountain Rural Electric Association (CO), Eagle River Water and Sanitation District, (CO)

Source: RRC Associates, Inc.; Rees Consulting, Inc.



SAN MIGUEL COUNTY

