



## REQUEST FOR PROPOSALS (RFP)

### Senior Housing Needs Assessment/ Market Study for the Village of Harrison

**Client:** Village of Harrison, W5298 State Road 114, Harrison, WI 54952

**RFP Deadline:** \_\_\_\_\_, 2025, at 3:00pm

**Estimated Study Deadline:** 8 months

#### **Background:**

The Village of Harrison incorporated from the Town of Harrison in 2013. Since that time the Village has seen aggressive growth in single family residential. In the past five years, the Village has also seen expansive growth in multi-family/apartment development. Like many Wisconsin communities, Calumet County's population is growing older and the Harrison has an interest in providing a livable community with a balance of housing for all residents. The focus of this study on senior housing specifically, indicates that there has been a lack of senior housing constructed. In reviewing the local market with developers, many said the Village should complete a needs assessment and market study prior to recruiting actual developers.

#### **Study Purpose:**

This Request for Proposals (RFP) is issued for the purpose of selecting a qualified firm to complete a Senior housing needs analysis and market demand study for the Village of Harrison, and the development of a comprehensive strategy to address senior housing needs within the community with projections to 2040. The successful responder shall demonstrate that they have the experience needed to complete the data collection and technical aspects of this study, as well as the ability to educate the stakeholders on the needs and gaps identified by the study, and gather stakeholder input to assist in the development of the comprehensive housing strategy.

The purpose of this housing study is to analyze the senior housing stock, inventory existing housing resources, identify gaps in the local housing market, identify trends that may affect the senior housing market over time, and help develop strategies to address the current and future needs of the community, with the overall goal of ensuring that senior housing opportunities are provided for households of all types, ages, and income levels.

**Scope of Service:**

The following is not intended to be a comprehensive itemization of tasks or activities needed to complete this housing study, but rather a guide to better explain the Harrison's intentions. Harrison will rely on its consultant's professional expertise to ensure that all pertinent factors are analyzed and is open to additional or alternative approaches to achieve the overall goal of identifying gaps between the Village's current housing supply and the existing and future housing needs of the community.

Potential project tasks and activities include the following:

**Background/Demographics**

1. Completion of a comprehensive population and demographic profile of the Village of Harrison in comparison to the recently completed Comprehensive Plan.
  - Define a primary housing draw area for the Village of Harrison.
  - Examine population and household growth trends and projections to 2040.
  - Include demographic data including, but not limited to, age, household size, net worth, tenure, incomes, household type, diversity, disability, etc.
  - Prepare summary of demographics and their impact on multi-family, workforce, and senior housing demand.
  - Discuss the implications of the findings on housing demand in Harrison.
2. Examine Employment Trends impacting housing needs and affordability
  - Summarize local data on resident employment (based on place of residence).
  - Summarize major employers and wages.
  - Identify commuting patterns and summary of place of residence to place of employment.
  - Interview economic development specialists, major employers, and local officials regarding major employment changes and other issues that may impact long-term employment projections.
  - Project job growth to 2040 and identify any sector expansion or contractions that might impact local housing market.
  - Analyze local wages compared to current housing costs and provide a summary of existing and the projected gap of housing units available at affordable levels compared to local wages.
  - Discuss the implications of the finding of senior housing demand in Harrison.

**Housing Analysis**

1. For-Sale Housing Market Analysis - provide an analysis of existing for-sale homes, housing value trends for existing homes and an inventory of active subdivisions with homes affordable for seniors, including low- and moderate- income households.
2. Senior Housing Market Analysis - provide an analysis of existing senior housing

including rental, for-sale, for-sale active adult, independent living, assisted living and memory care facilities. Prepare summary report on year built/remodeled, monthly rents, vacancies, per sq. ft. rents, unit types/sizes and features, common area amenities, etc

- Summarize pending senior developments in Appleton, Menasha and/or Kaukauna and the surrounding area and provide insight as to impact on market
- Identify need for additional senior housing by type, target markets, and income level including market rate and subsidized based on the following:
  - Units needed at or below 30% AMI
  - Units needed for 31-50% AMI
  - Units needed from 51-80% AMI

### Conclusion and recommendations

The results of the demographic study, housing inventory and market analysis conducted above shall be used to determine what deficiencies and surpluses of housing units exist for senior owner of various sizes, incomes, and types.

A gap analysis should be prepared to help Harrison identify senior housing needs in the community and aid efforts to develop and prioritize strategies to address these needs. The goal is to provide an estimate of the number of senior housing units needed (both rental and for sale) to meet the existing and future needs of the community based on unit type, number of bedrooms, price point, and location in relation to income levels and age categories.

### **Proposal:**

A written proposal submitted to the Village shall include the following information:

Letter of Transmittal. Address the letter of transmittal to the address set forth on the cover page of this RFP and include, at a minimum, the following:

- a. Identification of the offering firm, including business name, address, and telephone number;
- b. Name, title, address, telephone, and email address of contact person during period of proposal evaluation;
- c. A statement to the effect that the proposal shall remain valid for a period of not less than 120 days from the date of submittal; and
- d. Signature of a person authorized to bind the offering firm to the terms of the proposal.

Organization. In this section provide an organization chart showing the interrelationship of the team members and key personnel. Identify the team members' areas of responsibility. Provide subcontractors' company name, address, contact person, and telephone number. Describe your previous experience working with each subcontractor. For the purposes of this proposal, prior experience with all subcontractors is required to ensure that no major problems will occur to delay, complicate, or otherwise hamper the steady, reasonable progress of the study.

Qualifications & Experience. Identify similar studies (minimum 5) undertaken by the team

within the last five (5) years. Document the team members' actual responsibility on each project. For each study, provide the client's name, address and telephone number for a contact person currently available who is familiar with the firm's performance on each study listed. The contact person should be familiar with the firm's key personnel as references may be contacted.

Key Personnel. For each of the key personnel shown in the organization chart, provide a résumé and include in the project manager's résumé a summary of experience with similar studies.

Work Plan & Budget. The proposal should demonstrate the proposer's understanding of study goals based on scope. The proposal must include a clear description of the methods or process to be used to complete the scope of services. In addition, a project schedule should detail tasks, timelines and work products. The proposer should provide a detailed budget for the study within four (4) categories:

- Data collection and compilation.
- Mapping
- Findings, priorities and recommendations.
- Meetings and presentations (describe type, number and location).

Provide overall cost information as follows:

- a. Professional fees including hourly rates and number of hours worked by person;
- b. Direct expenses (equipment, supplies, etc.);
- c. Contract labor;
- d. Travel and lodging; and
- e. Other as appropriate.

Conflict of Interest. The proposer must identify any potential conflict of interest it may have providing the services contemplated by this RFP.

**Evaluation:**

Proposals will be evaluated on the following factors. Harrison has the right to reject any or all proposals without explanation.

**Experience of Firm(s)**

- The comprehensiveness, appropriateness, and quality of experience of the member firms;
- Response of references; and
- The presence of the appropriate disciplines.

**Experience of Personnel**

- Level of effort and participation of key personnel;
- Experience, education and qualifications of key personnel with similar roles and projects;
- Experience and interpersonal skills of project manager;
- Demonstrated ability to successfully lead the study; and
- Access/availability of project manager and key personnel.

**Work Plan for Scope of Services**

- Completeness and clarity of proposal;
- Scope of work approach, timing and substance;
- Understanding the study objective and work tasks;
- Proposed level of detail, documentation, and back-up material; and
- Ability to complete the study in a timely manner.

**Cost Allocation**

- Cost relative to proposed level of effort and products;
- Allocation of resources among work tasks (including person-hours);
- Ability to perform the study within budget; and
- Reasonableness of costs.

**Other Factors**

- Any other factors deemed relevant by the Village.

**Deadline:**

Proposals shall be submitted electronically no later than 3:00 p.m. on \_\_\_\_\_, 2025

Chad Pelishek  
Assistant Village Manager  
Village of Harrison  
W5298 State Road 114  
Harrison, WI 54952  
E-mail: [cpelishek@harrison-wi.org](mailto:cpelishek@harrison-wi.org)

Further information may be obtained from Chad Pelishek at 920-989-1062 ext. 109 or by e-mail ([cpelishek@harrison-wi.org](mailto:cpelishek@harrison-wi.org)).