



Root Policy Research

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RFP for Facilitation

Chaffee County Developer's Forum

PREPARED FOR:

Chaffee County
Director of Housing
Attn: Becky Gray
bgray@chaffeecounty.org

DUE DATE

before 03/22/2021



March 20, 2021

Chaffee County
Director of Housing
Becky Gray, bgray@chaffeecounty.org

Re: Request for Quote: Skilled Facilitator

Dear Evaluation Committee:

Root Policy Research (Root) is pleased to submit this proposal to Chaffee County for skilled facilitation of a Developer's Forum.

Root is a women-owned business based on Denver, Colorado with more than 20 years of experience assisting local governments and states with policy development related to housing.

We believe we are the optimal team for this study—and are very interested in being selected to conduct this work—for several reasons:

- Our institutional knowledge of housing policy—what works, what is risky, how outcomes vary—is deep. We are not new to this increasingly complex industry.
- Our team has considerable experience with all facets of this work in Colorado—in both urban and rural communities.
- We have successfully facilitated strategic housing work groups for many clients including those in Oregon, New Mexico, Kansas, and Colorado (Cities of Aurora, Westminster, and Denver). In fall 2020, we were selected to assist with the Governor's Special Eviction Prevention (SEP) Task Force and are currently facilitating meetings of the State Strategic Housing Working Group (SHWG) for the Colorado Division of Housing.
- We understand the challenges of developing affordable housing in Colorado including rising commodity costs, labor shortages, community concerns about growth, and land use and zoning barriers.

The facilitator for this project would be Heidi Aggeler, co-founder and Managing Director of Root Policy. Heidi works from Root's offices in Denver at 6740 East Colfax Avenue and would facilitate the Developer's Forum virtually using a platform of your choice. Heidi can be contacted through phone on 970.880.1415 x102 and heidi@rootpolicy.com.

Heidi Aggeler and Mollie Fitzpatrick, Root's founders and managing directors, have the authority to commit the consulting team to the terms of this proposal.

Thank you for the opportunity to propose on this very important project. We hope to have the opportunity to work with you.

Sincerely,

A handwritten signature in blue ink, appearing to read "Mollie Fitzpatrick". The signature is stylized with a large initial "M" and a long horizontal stroke at the end.

Mollie Fitzpatrick
Managing Director

A handwritten signature in blue ink, appearing to read "Heidi Aggeler". The signature is written in a cursive style with a large initial "H".

Heidi Aggeler
Managing Director

PROJECT UNDERSTANDING & APPROACH TO SCOPE OF WORK

Chaffee County's Office of Housing seeks a skilled facilitator to lead discussions of a Developer's Forum. The Forum will provide input on county and municipal land use codes to inform a future Land Use Code update. Input from the Forum will be vetted and prioritized by an existing Planning Collaborative, documented in a formal report, and presented to area stakeholders and the Chaffee County Planning Commissioners.

TASK 1: PROJECT INITIATION MEETING

Our first task would be a virtual project initiation meeting with the Chaffee County Office of Housing and Root project team members. At this meeting we would discuss the primary objectives of the Planning Collaborative and jointly envision what a successful project may look like; agree on the dates and times for Planning Collaborative meetings; set up regular check in meetings between our team and the Chaffee County Office of Housing project manager; establish file sharing systems and protocol; and review our proposed facilitation strategy.

Following this meeting, with the County's permission, our team would reach out to each Planning Collaborative member for 20 minute interviews to gain an understanding of member positions on forum topic areas.

Timeline: This meeting would occur on April 5 or 6

TASK 2: MEETING COORDINATION AND FACILITATION

The key elements of Task 2 include the following:

- Establish a protocol for meetings and develop procedures to resolve challenges (dominant speakers, nervous speakers, technology challenges, potential conflict among Planning Collaborative members) as needed;
- Develop agendas for each meeting 1 week in advance for the County, Planning Collaborative, and Developer's Forum members;
- Prepare discussion guides and presentations for each meeting;
- Facilitate each meeting;
- Provide engaging exercises, activities, and humor as part of the facilitation to ensure a comfortable and relaxed yet professional atmosphere;
- Constructively challenge participants to think creatively and share the floor; and
- Work with County staff to ensure that the meetings are returning needed input for the future land use code update—and revise meeting structure as needed.

SESSION 1. This meeting would begin with an overview of the Planning Collaborative responsibilities, time expectations, and deliverables.

Root and/or Chaffee County staff would provide an overview of the newly adopted Comprehensive Plan, upcoming land use code update, and municipal growth boundaries.

Root would lead an exercise using an online civic engagement tool such as Mentimeter—dependent on the Planning Collaborative members' comfort level. This exercise would be used to identify development and land use topics within the municipal growth boundaries in Chaffee County which create barriers to development and should be considered by the Developer's Forum.

ROOT DELIVERABLE. A detailed stakeholder interview and workshop guide which includes a memo of land use topics for consideration by the Forum. This guide would be used to facilitate Session 2a and 2b.

Timeline: Meeting would occur on April 12 or 13 with a guide and memo of topics for consideration delivered 1-2 days following the meeting.

SESSION 2A AND 2B. Root would convene two workshop sessions with developers, funders, and economic development professionals ("Developer's Forum" members). Stakeholder contacts for these sessions would be provided by Chaffee County and groups would be divided to focus on municipal growth zones in Salida and Poncha Springs and then Buena Vista and Johnson Village. We assume that the Collaborative members could make all meetings but, in the event a conflict arises, we would follow with individual interviews as needed.

The proposed two hour workshops—guided by the stakeholder guide generated in Session 1—would consist of the following discussion items, breakout rooms, or exercises—subject to change based on Planning Collaborative or Chaffee County staff input.

- 1) Welcome with a brief "Get to know the Planning Collaborative" game with trivia about Chaffee County and each Planning Collaborative member.
- 2) Identification of projects (residential, industrial, commercial) in the pipeline;
- 3) Guided discussion of barriers and/or issues with development or cost increases;
- 4) Ranking or prioritization exercise;
- 5) Creative solution facilitation.

ROOT DELIVERABLE. Memorandum of key findings based on input from Session 2a and 2b.

Timeline: These meetings would occur during the weeks of April 19 and 25.

SESSION 3. Root would reconvene the Planning Collaborative to vet and react to key findings and solutions identified during Sessions 2a and 2b. The Planning Collaborative would receive the memorandum of key findings from the previous sessions prior to the meeting.

Root would be prepared to walk members through the issues and/or barriers identified by stakeholders and their creative solutions as a clear and concise package of proposals. Planning

Collaborative members would engage in an active discussion to further develop the ideas and materials produced by the stakeholder groups.

Timeline: This meeting would occur on April 26 or 27 with a draft report delivered on April 30

ROOT DELIVERABLE. Draft report including the process undertaken by the project team and Planning Collaborative in Sessions 1, 2a, 2b, and 3 and prioritized solutions identified in Session 3.

SESSION 4. Root would provide the Planning Collaborative members with the draft report after the Session 3 discussion. The Planning Collaborative would be reconvened to identify specific land use code changes that would facilitate change and further proposed solutions. The session would primarily be used to generate ideas and gain clarity on impacts of specific land use changes on development in municipal growth boundaries.

ROOT DELIVERABLE. Draft report including the process undertaken by the project team and Planning Collaborative in Sessions 1, 2a, 2b, 3, and 4 and prioritized potential solutions that can be codified during the upcoming Land Use Code update.

Timeline: This meeting would occur on May 3 with a final report and draft presentations for Sessions 5 and 6 delivered on May 7.

SESSION 5. Root would host a webinar to present the final report to stakeholder participants and the Planning Collaborative to field questions and gain final approval by those involved in the process.

SESSION 6. Root would present the final report to Chaffee County Planning Commissioners during a regularly scheduled meeting.

Timeline: These meetings would occur during the week of May 10.

FACILITATION STYLE AND PHILOSOPHY

We do not operate with a structured facilitation approach—and, instead, tailor our meetings to our clients' needs. Our overriding commitment when facilitating is to create an environment of respect and equality, recognizing that stakeholders often come from very different places.

Our team spent two years working with the U.S. Department of Housing and Urban Development (HUD) conducting 2 ½ day trainings on implementation of the former Assessment of Fair Housing (AFH) requirement. We developed a number of techniques at these meetings to help diffuse the difficult conversations that often arose at these trainings, including the use of best practices and case studies to dissect policy problems and assigning attendees varying roles in forming policy.

VIDEO PLATFORM FACILITATION

Our team has conducted facilitation with nearly all platforms including Zoom, Teams, Go To Meeting, and WebEx. Since the pandemic began, we have facilitated approximately one meeting per week—for more than 20 meetings—with stakeholders and residents, and presented at City Council or public sector board meetings twice per month on average.

It is challenging to keep attendees challenged during virtual meetings. In person meetings allow more spontaneous use of materials, feel more collaborative, and are naturally more self-regulating.

Our philosophy with virtual meetings is to replicate in person meetings as much as possible. To that end, we prefer to avoid conversations in the “chat” box. Ideally, as advance planning and time allows, we break up the meetings with fun exercises, case studies and best practices, break out discussions, and opportunities for attendees build upon relationships.

EXPERIENCE WITH SIMILAR WORK

Root Policy Research is a women-owned business founded by two former partners at BBC Research & Consulting (BBC), Heidi Aggeler and Mollie Fitzpatrick. Heidi joined BBC in 1998 and, during her 20 tenure at the firm, expanded BBC's housing division into a nationally recognized housing research and consulting practice. Mollie has led the development of the data- and impact-modeling areas of the practice, in addition to expanding the firm's policy focus into the areas of child care, education, neighborhood-level equity, and economic mobility.

Our website is www.rootpolicy.com. Our sole office is located in the East Colfax neighborhood of Denver at 6740 East Colfax Avenue, Denver, Colorado, 80220. The project contact for this proposal is Heidi Aggeler, Managing Director, heidi@rootpolicy.com and 970-880-1415 x102. We currently have 6 employees and have been in business continuously for 2 years. Prior to forming Root, Heidi Aggeler and Mollie Fitzpatrick were in business together within BBC for 8 years.

WHAT WE DO

- Housing Market Studies
- Strategic Plans for Housing and Community Development
- Assessments of Fair Housing/Analyses of Impediments to Fair Housing Choice
- Economic Mobility Studies

EXPERIENCE

Years of Housing Market research = **19**

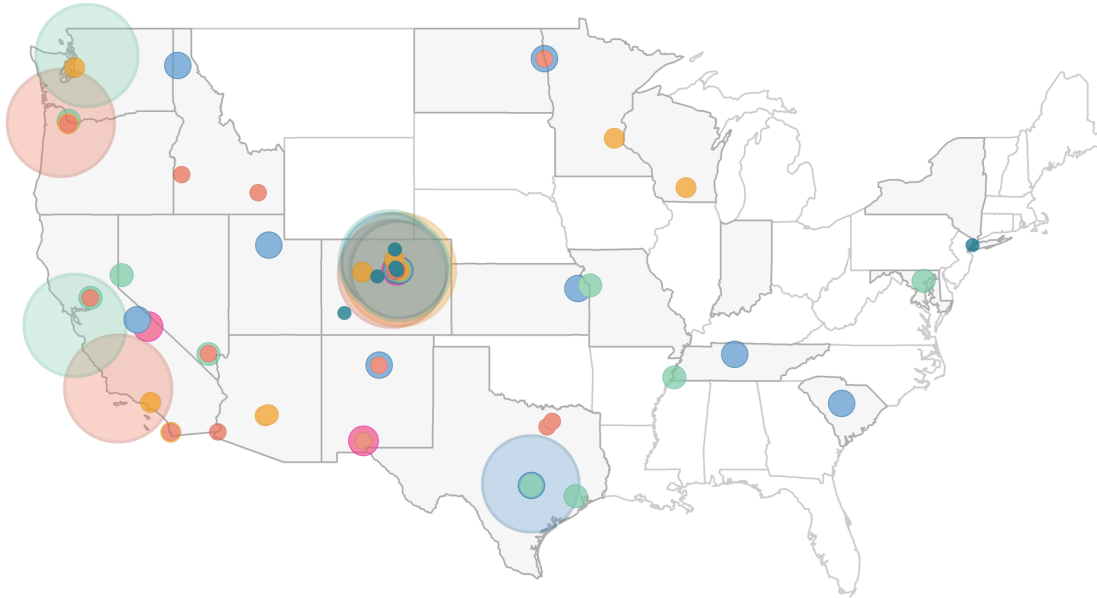
Years of Fair Housing planning = **17**

Years of Consolidated Plan experience = **28**

Years of Economic Equity Research = **11**

Root Policy was founded to advance economic consulting and policy analysis in many areas critical to the development of thriving communities

GEOGRAPHIC REACH



HOUSING MARKET STUDIES

California: Mammoth Lakes
Colorado: Arvada, Aurora, Boulder, Broomfield, Denver
Idaho: Coeur d'Alene **Kansas:** Lawrence
New Mexico: Santa Fe
North Dakota: Grand Forks
South Carolina: Columbia
Tennessee: Nashville **Texas:** Austin Travis County
Utah: Salt Lake City

COMMUNITY ENGAGEMENT

California: Bishop – Economic Development Strategy
Colorado: Denver's Strategic Plan for Homelessness; Colorado Civic Rights Division Survey
New Mexico: Las Cruces Homeless Survey

FAIR HOUSING ANALYSIS

California: Sacramento, San Mateo County
Colorado: Aurora; Denver; Boulder
Maryland: Baltimore
Missouri: Kansas City
Nevada: Las Vegas, Reno
Tennessee: Memphis
Texas: Austin, Houston
Washington: Snohomish County, Vancouver

HUD CONSOLIDATED PLANS

Arizona: Yuma **California:** Sacramento, Santa Barbara, San Diego
Colorado: Adams County, Boulder, Denver, Lakewood, Jefferson County, Westminster
Idaho: Nampa, Pocatello
Indiana: State of Indiana
New Mexico: Las Cruces, Santa Fe
Nevada: North Las Vegas
North Dakota: Grand Forks
Oregon: Washington County/Portland
Texas: Carrollton, McKinney

ECONOMIC AND SOCIAL IMPACT ANALYSIS

Colorado: Child Care - Breckenridge, Telluride; Army Post Expansion - Fort Carson; Language Access - Westminster; Social Sustainability- Fort Collins
Colorado and New York: Neighborhood Economic Potential, Seedco, Denver and NYC
Utah: State of Utah; Economic Impact—Emily Griffith Opportunity School CDFI Impact

RESIDENTIAL MARKET RESEARCH

Arizona: Phoenix, Scottsdale
California: Los Angeles, San Diego
Colorado: Colorado Housing and Finance Agency, State of Colorado; Aurora, Denver, Eagle, Longmont
Minnesota: Minneapolis
Oregon: Portland
Washington: Seattle
Wisconsin: Madison

COLORADO EXPERIENCE

We have conducted housing studies in nearly all areas of Colorado, from the Eastern plains to the Western Slope and the resort areas in between, and in many urban, suburban, and ex-urban communities along the Front Range. A comprehensive list of the Colorado communities in which we've worked is included below.

Counties	Cities/Towns
Adams County	Arvada
Arapahoe County	Aspen
Boulder County	Aurora
Broomfield County	Boulder
Clear Creek County	Breckenridge
Douglas County	Broomfield
Gilpin County	Colorado Springs
Gunnison County	Commerce City
Jefferson County	Denver
Montezuma County	Denver Metro Area
Routt County	Eagle
San Miguel County	Fort Carson
Weld County	Fort Collins
	Highlands Ranch
	Lakewood
	Littleton
	Longmont
	Pueblo
	Ridgway
	Silverton
	Thornton
	Vail
	Westminster

STRATEGIC HOUSING WORKING GROUP

DATE: 2021

TYPE: STRATEGY
FACILITATION

Heidi Aggeler, with Julia Jones' assistance, is currently working for the Colorado Division of Housing to facilitate 5-6 meetings over 6 months with a Strategic Housing Working Group (SHWG). The SHWG was convened by CDOH to recommend policy initiatives to respond to short-, medium- and longer term challenges associated with a variety of topic areas related to affordable housing. Heidi's role is to prepare meeting agendas, convene policy subgroups and facilitate subgroup meetings, develop discussion agendas, conduct follow up research, and provide support for a series of "white papers" on policy recommendations that will be provided to the State Housing Board.

SPECIAL EVICTION PREVENTION TASK FORCE

DATE: 2020

TYPE: STRATEGY
FACILITATION

Heidi Aggeler worked with the Colorado Division of Housing and Governor Polis' office to facilitate four meetings with a special Task Force convened to recommend policy initiatives to respond to short-, medium- and longer term challenges associated with evictions. She prepared weekly agendas, coordinated with guest speakers, developed discussion strategies, conducted follow up research, and drafted the Task Force report for submission to CDOH and the Governor.

WESTMINSTER, COLORADO HOUSING STRATEGY

DATE: 2017-2018

TYPE: HOUSING STRATEGY

Heidi Aggeler first prepared a housing needs assessment for Westminster in 2016 and, following this plan, was hired to facilitate the development of a strategic housing plan. The needs assessment was a data-driven project that included demographic and housing profiles, a gaps analysis, identification of housing needs, and recommendations. Data were presented in a highly visual format with dashboard-style infographics for different population groups.

The strategic planning process brought together residents, housing developers (private and nonprofit), advocates for the homeless and low-income workers, City leaders, City finance staff, City planners, employers, and economic development officials. Heidi facilitated monthly committee meetings in which committee members considered a menu of options to address housing needs. The study culminated in a housing plan that was approved by City Council.

LAWRENCE, KANSAS HOUSING STRATEGY

DATE: 2017-2018

TYPE: HOUSING MARKET
ANALYSIS AND HOUSING
STRATEGY

During 2018, Heidi Aggeler worked with the City of Lawrence, Kansas on a comprehensive housing market study to identify housing needs in the city and to inform the allocation of the city's new Affordable Housing Trust Fund. The study highlights expected demographic trends, future demands for housing, regulations, and obstacles preventing the market from effectively responding to this demand, and an inventory of the assets and programs currently available to help the community address these challenges.

Strategy development included two workshops with the City's newly established housing committee, charged with recommending approaches to allocate the City's new housing trust fund. We also developed a "housing needs dashboard" and "roadmap" in an Excel model for staff and committee use in implementation and monitoring success.

AURORA MOBILE HOME TASK FORCE

DATE: 2018

TYPE: MOBILE HOME
STRATEGY

In 2018, the City of Aurora, Colorado created a Mobile Home Task Force to study the lack of affordable housing in Aurora and to make recommendations of possible solutions to the displacement of mobile home park residents due to closures, rezoning, and redevelopment. Mollie Fitzpatrick was contracted help facilitate Task Force discussions, provide market metrics on mobile homes, and draft the report of recommendations on behalf of the Task Force. The report identified top needs related to affordability and displacement. It also provided policy and program solutions to address key concerns and to help improve protections for mobile home parks and residents.

LOW INCOME HOUSING TAX CREDIT COST STUDY

DATE: 2017

TYPE: FINANCIAL ANALYSIS

Prompted by rapidly rising rents, increases in development costs, national and local concerns over the cost of developing affordable housing, and increased demand for affordable housing, the Colorado Housing and Finance Authority (CHFA) engaged our team to examine trends in LIHTC developments costs in Colorado. The analysis aimed to identify cost trends, explain why development costs are increasing, and consider solutions for the challenges created by rising development costs. We conducted an in-depth, trend analysis of development pro formas for applications that were awarded credits and those that were not. Our analysis found that cost increases are due to a handful of factors, with the primary driver being construction costs (labor and materials). Overall, findings from the study recognize CHFA's ability to balance innovation and flexibility with cost containment.

LAND TRUST PRO FORMA ANALYSIS

DATE: 2018

TYPE: FINANCIAL MODEL

In collaboration with Urban Land Conservancy and Gary Community Investments, Mollie tested the feasibility of a regional land trust through pro-forma modeling. The work evaluated the capital requirements for a successful venture as well as resiliency of the model under a variety of economic shocks. Our work on the pro-forma analysis tested current assumptions and model viability and evaluates the pro forma under different market cycle and borrowing scenarios. Root also conducted best practices research on land trust structure and strategies for land trusts in changing market conditions as well as best practices for wrap-around services for land trust beneficiaries. The analysis was conducted as part of the incubation of what is now Elevation Community Land Trust.

BOULDER MIDDLE MARKET HOUSING STUDY

DATE: 2015

TYPE: HOUSING RESEARCH

For the City of Boulder, we examined trends in the affordability of attached housing products relative to single family detached units. In addition to a comprehensive analysis of historical sales records, we conducted in-person interviews with developers of attached housing products—both rental and for sale—to understand the key challenges of building affordable housing in Boulder. We forecast product types that would no longer be affordable to moderate income households if price increases continue and analyzed the city's downpayment assistance policy to determine if increasing the amount would expand options for purchase.

"Heidi—I really enjoyed our work together, and deeply appreciated your mastery of the data and ability to explain it in such an accessible, objective manner. Hope our paths cross again!" –David Driskell, Planning Director, City of Boulder

REFERENCES

ELENI ANGELIDES, POLICY ANALYST Governor Jared Polis and joint project manager for the Colorado Eviction Prevention Task Force. eleni.angelides@state.co.us and 832.722.8838

JENNI GRAFTON, ECONOMIC DEVELOPMENT COORDINATOR City of Westminster and project lead on strategic housing plan. jgrafton@cityofwestminster.us and 303-658-2105.

ANDREW PAREDES, COLORADO DIVISION OF HOUSING COORDINATOR of the Strategic Housing Working Group, andrew.paredes@state.co.us

PROJECT COST

Our firm's contracts are typically on a fixed-price, not-to-exceed basis. Our estimate of the total project cost, with estimated hours for each task and hourly rates, is shown in the figure below. As the figure shows, we would dedicate 20 hours of pro bono time to the project as part of our broader commitment to development of land use codes that support housing choice.

Estimated Project Cost

Task	Directors (\$175/hr)	Directors Pro Bono	Research Associate (\$125/hr)	Total Hours	Total Fees
Task 1: Project initiation meeting	2		2	4	\$600
Task 2: Preparation: Plan and Code Review		8			\$0
Interviews of Planning Collaborative Members	4	8	0	12	\$700
Memo on Land Use Topics and Facilitation Guide	8		2	10	\$1,650
Meeting facilitation: Session 2a	4		2	6	\$950
Meeting facilitation: Session 2b	4		2	6	\$950
Convening Meeting to review 2a and 2b Summaries; prioritize solutions: Session 3	6		2	8	\$1,300
Meeting to develop Recommendations for Land Use Changes	6		2	8	\$1,300
Task 3: Final Reports and Presentations 2)	12	4	2	18	\$2,350
Total Cost					\$9,800

PROJECT TEAM

Heidi Aggeler would be the project manager and lead facilitator. Julia Jones would assist with logistical support, code review, and meeting summaries. Mollie Fitzpatrick would assist with the project if needed.

Heidi Aggeler, Root Policy Research, Managing Director

Heidi founded Root Policy Research after working at BBC Research & Consulting (BBC) for 20 years. Prior to this, she was an economic analyst at the Federal Reserve and an auditor for the Federal Deposit Insurance Corporation (FDIC). Heidi holds an undergraduate degree in accounting and a Master's degree in policy analysis from the Humphrey Institute at the University of Minnesota. Heidi is a current member of the Denver Planning Board.

Colorado Housing Policy Work:

- Special Eviction Prevention Task Force facilitator, 2020
- Denver Resident Preference Policy, 2019
- Denver Affordable Housing Zoning Incentives, 2020
- Adams County Consolidated Plan and Fair Housing Analysis, 2020
- Boulder Broomfield Consortia Consolidated Plan, Housing Market Assessment, and Community Needs Assessment, 2020
- Denver guest presenter and research support to several housing affordability task forces, various
- Westminster, Colorado Language Access Plan, ongoing
- Westminster Strategy Housing Plan and housing advisory committee facilitator, 2017
- Ridgway Housing Element component of Comprehensive Plan, 2019
- Fort Collins Social Sustainability Needs Assessment, 2015
- Fort Collins Analysis of Impediments to Fair Housing Choice, 2014
- Westminster Housing Market Assessment and Consolidated Plan, 2018
- Westminster Analysis of Impediments to Fair Housing Choice, 2015
- Denver Regional Council of Governments, Fair Housing Equity Assessment, 2014
- Routt County Housing Needs Assessment, 2009
- Gunnison County Housing Needs Assessment, 2008
- Montezuma County Housing Needs Assessment, 2009
- State of Colorado Civil Rights Division, predatory lending study, 2009
- State of Colorado Civil Rights Division, fair housing knowledge and awareness survey, 2004
- Southern Ute Tribal Housing Study, 2000

Housing policy training and presentations:

- HUD Assessment of Fair Housing (AFH) training, New Orleans, Kansas City, Los Angeles, Atlanta, Austin, Salt Lake City, April 2016 – June 2017.
- Colorado Housing Finance Authority (CHFA) Board of Directors on the *TDHCA v. ICP* Supreme Court decision and implications on tax credit allocations, Vail, Colorado, September 2016.
- Rocky Mountain Land Use Institute's 25th Anniversary Conference, Denver, Colorado, March 2016. Co-presenter with attorney Brian Connolly and attorney/planner Don Elliott on *Applying Fair Housing Requirements to Western Cities*.
- American Planning Association (APA) National Conferences, New York, Phoenix, Seattle, 2015, 2016, and 2017.
- Guest Lecturer, University of Denver Sturm College of Law, *Sustainability and Equity in Housing Development*, October 2012.
- Kansas City, Missouri Civil Rights Conference speaker, April 2011.

Mollie Fitzpatrick, Root Policy Research, Managing Director

Mollie co-founded Root Policy Research in 2018 after serving as a director at BBC Research & Consulting. She specializes in housing market and economic and social impact studies. Mollie has developed several customized neighborhood-level housing equity models and estimated the economic impact of education and childcare programs. She is familiar with a wide range of socioeconomic and demographic data sources. Mollie holds a Master's degree in Economics.

Julia Jones, Root Policy Research, Associate

Julia is a multi-faceted analyst with data modeling, data analysis, GIS, and graphic design skills. With a background in Urban Planning, Julia brings a unique perspective and deep understanding to her areas of interest which include housing needs and preferences, fair housing, equitable community development, and the economic impact of public investment.

Julia has recently examined public policies and land use regulations, and evaluated impediments to fair housing choice for several clients, most in rural and ex-urban areas. She has completed social sustainability gaps analyses; best practice reviews of density-based affordable housing incentives; and housing market studies.

Julia is currently pursuing her American Institute of Certified Planners (AICP) certification in May of 2021.

Education:

Bachelor of Urban Planning, University of Cincinnati, 2017