



**TOWN OF PAONIA**  
**WEDNESDAY, MARCH 01, 2023**  
**TOWN BOARD WORK SESSION AGENDA 9:00 AM**  
**[HTTPS://US02WEB.ZOOM.US/J/85130092210](https://us02web.zoom.us/j/85130092210)**  
**MEETING ID: 851 3009 2210**  
**ONE TAP MOBILE**  
**17193594580**

**Roll Call**

**Work Session**

Affordable Housing Interviews Work Session

- 9:05 am [Matrix Design Group](#)
- 10:15 am [Economic Planning Systems](#)
- 11:25 am [Urban Rural LLC](#)

**Adjournment**

**Reminder: No formal action can be taken during a Board Work Session. As such, no public comment will be taken, and no minutes will be recorded. The Work Session will be recorded and available for viewing.**

AS ADOPTED BY:  
TOWN OF PAONIA, COLORADO  
RESOLUTION NO. 2017-10 – Amended May 22, 2018

I. RULES OF PROCEDURE

**Section 1. Schedule of Meetings.** Regular Board of Trustees meetings shall be held on the second and fourth Tuesdays of each month, except on legal holidays, or as re-scheduled or amended and posted on the agenda prior to the scheduled meeting.

**Section 2. Officiating Officer.** The meetings of the Board of Trustees shall be conducted by the Mayor or, in the Mayor's absence, the Mayor Pro-Tem. The Town Clerk or a designee of the Board shall record the minutes of the meetings.

**Section 3. Time of Meetings.** Regular meetings of the Board of Trustees shall begin at 6:30 p.m. or as scheduled and posted on the agenda. Board Members shall be called to order by the Mayor. The meetings shall open with the presiding officer leading the Board in the Pledge of Allegiance. The Town Clerk shall then proceed to call the roll, note the absences and announce whether a quorum is present. Regular Meetings are scheduled for three hours, and shall be adjourned at 9:30 p.m., unless a majority of the Board votes in the affirmative to extend the meeting, by a specific amount of time.

**Section 4. Schedule of Business.** If a quorum is present, the Board of Trustees shall proceed with the business before it, which shall be conducted in the following manner. Note that all provided times are estimated:

- (a) Roll Call - (5 minutes)
- (b) Approval of Agenda - (5 minutes)
- (c) Announcements (5 minutes)
- (d) Recognition of Visitors and Guests (10 minutes)
- (e) Consent Agenda including Approval of Prior Meeting Minutes (10 minutes)
- (f) Mayor's Report (10 minutes)
- (g) Staff Reports: (15 minutes)
  - (1) Town Administrator's Report
  - (2) Public Works Reports
  - (3) Police Report
  - (4) Treasurer Report
- (h) Unfinished Business (45 minutes)
- (i) New Business (45 minutes)
- (j) Disbursements (15 minutes)
- (k) Committee Reports (15 minutes)
- (l) Adjournment

\* This schedule of business is subject to change and amendment.

**Section 5. Priority and Order of Business.** Questions relative to the priority of business and order shall be decided by the Mayor without debate, subject in all cases to an appeal to the Board of Trustees.

**Section 6. Conduct of Board Members.** Town Board Members shall treat other Board Members and the public in a civil and polite manner and shall comply with the Standards of Conduct for Elected Officials of the Town. Board Members shall address Town Staff and the Mayor by his/her title, other Board Members by the title of Trustee or the appropriate honorific (i.e.: Mr., Mrs. or Ms.), and members of the public by the appropriate honorific. Subject to the Mayor's discretion, Board Members shall be limited to speaking two times when debating an item on the agenda. Making a motion, asking a question or making a suggestion are not counted as speaking in a debate.

**Section 7. Presentations to the Board.** Items on the agenda presented by individuals, businesses or other organizations shall be given up to 5 minutes to make a presentation. On certain issues, presenters may be given more time, as determined by the Mayor and Town Staff. After the presentation, Trustees shall be given the opportunity to ask questions.

**Section 8. Public Comment.** After discussion of an agenda item by the Board of Trustees has concluded, the Mayor shall open the floor for comment from members of the public, who shall be allowed the opportunity to comment or ask questions on the agenda item. Each member of the public wishing to address the Town Board shall be recognized by the presiding officer before speaking. Members of the public shall speak from the podium, stating their name, the address of their residence and any group they are representing prior to making comment or asking a question. Comments shall be directed to the Mayor or presiding officer, not to an individual Trustee or Town employee. Comments or questions should be confined to the agenda item or issue(s) under discussion. The speaker should offer factual information and refrain from obscene language and personal attacks.

**Section 9. Unacceptable Behavior.** Disruptive behavior shall result in expulsion from the meeting.

**Section 10. Posting of Rules of Procedure for Paonia Board of Trustees Meetings.** These rules of procedure shall be provided in the Town Hall meeting room for each Board of Trustees meeting so that all attendees know how the meeting will be conducted.

## **II. CONSENT AGENDA**

**Section 1. Use of Consent Agenda.** The Mayor, working with Town Staff, shall place items on the Consent Agenda. By using a Consent Agenda, the Board has consented to the consideration of certain items as a group under one motion. Should a Consent Agenda be used at a meeting, an appropriate amount of discussion time will be allowed to review any item upon request.

**Section 2. General Guidelines.** Items for consent are those which usually do not require discussion or explanation prior to action by the Board, are non-controversial and/or similar in content, or are those items which have already been discussed or explained and do not require further discussion or explanation. Such agenda items may include ministerial tasks such as, but not limited to, approval of previous meeting minutes, approval of staff reports, addressing routine correspondence, approval of liquor licenses renewals and approval or extension of other Town licenses. Minor changes in the minutes such as non-material Scribner errors may be made without removing the minutes from the Consent Agenda. Should any Trustee feel there is a material error in the minutes, they should request the minutes be removed from the Consent Agenda for Board discussion.

**Section 3. Removal of Item from Consent Agenda.** One or more items may be removed from the Consent Agenda by a timely request of any Trustee. A request is timely if made prior to the vote on the Consent Agenda. The request does not require a second or a vote by the Board. An item removed from the Consent Agenda will then be discussed and acted on separately either immediately following the consideration of the Consent Agenda or placed later on the agenda, at the discretion of the Board.

## **III. EXECUTIVE SESSION**

**Section 1.** An executive session may only be called at a regular or special Board meeting where official action may be taken by the Board, not at a work session of the Board. To convene an executive session, the Board shall announce to the public in the open meeting the topic to be discussed in the executive session, including specific citation to the statute authorizing the Board to meet in an executive session and identifying the particular matter to be discussed “in as much detail as possible without compromising the purpose for which the executive session is authorized.” In the event the Board plans to discuss more than one of the authorized topics in the executive session, each should be announced, cited and described. Following the announcement of the intent to convene an executive session, a motion must then be made and seconded. In order to go into executive session, there must be the affirmative vote of two thirds (2/3) of Members of the Board.

**Section 2.** During executive session, minutes or notes of the deliberations should not be taken. Since meeting minutes are subject to inspection under the Colorado Open Records Act, the keeping of minutes would defeat the private nature of executive session. In addition, the deliberations carried out during executive session should not be discussed outside of that session or with individuals not participating in the session. The contents of an executive session are to remain confidential unless a majority of the Trustees vote to disclose the contents of the executive session.

**Section 3.** Once the deliberations have taken place in executive session, the Board should reconvene in regular session to take any formal action decided upon during the executive session. If you have questions regarding the wording of the motion or whether any other information should be disclosed on the record, it is essential for you to consult with the Town Attorney on these matters.

## **IV. SUBJECT TO AMENDMENT**

**Section 1. Deviations.** The Board may deviate from the procedures set forth in this Resolution, if, in its sole discretion, such deviation is necessary under the circumstances.

**Section 2. Amendment.** The Board may amend these Rules of Procedures Policy from time to time.

**File Attachments for Item:**

- 1. Affordable Housing Assessment Interviews



Matrix Design Group



# Matrix

Anniston, AL

Atlanta, GA

Colorado Springs, CO

Denver, CO

Niceville, FL

Parsons, KS

Phoenix, AZ

San Antonio, TX

Tamuning, GU

Texarkana, TX

Washington, DC



A Proposal to Prepare

# Housing Needs Assessment & Housing Action Plan



PREPARED FOR  
**Town of Paonia**

February 8, 2023





# Cover Letter

February 8, 2023

Leslie Klusmire, Interim Town Administrator  
Town of Paonia  
214 Grand Avenue  
Paonia, CO 81428

**RE: RFP Housing Needs Assessment & Housing Action Plan**

Dear Ms. Klusmire and Members of the Selection Committee:

The Town of Paonia's (Town) first Housing Needs Assessment & Housing Action Plan is a critical opportunity for the Town to close the housing gaps that have resulted from the recent influx of retirees and young entrepreneurs. **Matrix Design Group, Inc.** (Matrix), in association with **SCJ Alliance** (SCJ), is pleased to present the following proposal for housing consulting services. With multiple offices in Colorado, Matrix brings a knowledgeable, skilled, and experienced team to help the Town bring supply and demand into equilibrium and, in turn, reverse the trend of sharp price increases that have affected residents belonging to all demographic groups, but have disproportionately impacted seniors, seasonal workers, and other underserved populations. With offices in Crested Butte, Gunnison, and Boulder, SCJ augments Matrix's local knowledge and experience by adding valuable perspective on the unique housing challenges facing smaller mountain communities.

Established in 1999, Matrix is an award-winning multidisciplinary firm with **nearly 200 employees** nationwide, most of whom work out of our Colorado Springs and Denver offices. Matrix has more than **23 years of experience** aiding Colorado communities of varying sizes and characters. Familiarity with the Western Slope will enable us to recruit public participants, deploy resources, and deliver the requested services with maximum efficiency. Matrix complements our substantial local presence with significant housing analysis and inventory experience **both locally and nationwide**. Featuring a PhD-led analytics group trained to use cutting-edge data science and statistical methods, along with a distinguished team of planners and Geographic Information System (GIS) specialists, Matrix has the expertise needed to successfully execute this project on behalf of the Town. Our analysis, coupled with the best information available, will help the Town better understand its housing challenges and provide the community, its leaders, and its stakeholders with a comprehensive roadmap for addressing them that includes, among other recommendations, guidance on forming a housing authority. In addition, as a full-service civil engineering firm, Matrix is cognizant of the need for any recommendations to account for the infrastructure challenges facing the Town.

Matrix strategically selected SCJ, a full-service professional planning and engineering services firm, as our teaming partner. Housing plans and studies have formed the basis of much of their work, and they have gained a reputation for helping communities realize their visions for the future. Their significant experience in leading housing-specific public outreach and stakeholder engagement efforts, along with their vast knowledge of Colorado state regulations and planning efforts throughout the west, makes them the ideal partner for this study.

Matrix’s capabilities are further amplified by **our in-house, award-winning Geographic Information System (GIS) and Graphics Teams**. Our GIS professionals specialize in turning data and geospatial analysis into visual maps and graphics that help tell the story. The products and tools Matrix develops will be fully integrated so the Town can host them on existing web platforms. Complementing our web-based capabilities is a graphics team who turns plain text documents and spreadsheets into **powerful strategic communication products in both Spanish and English** for conference sessions, public workshops and outreach, and printed reports.

Matrix is committed to delivering the highest quality product to our clients every time, as evidenced by our extensive Colorado experience and numerous project awards. Our unified approach is well received by our partners, and Matrix is **nationally recognized for being an extension of our clients**.

**Project Director/Principal Contact:**

Gregory Shaner, PE      719.575.0100      gregory.shaner@matrixdesigngroup.com

**Professional Staff Assigned:**


- Christian Caron, PhD      Project Manager; Demographic, Marketing, & Housing Analysis Task Lead
- Larry Dotson      Quality Assurance/Quality Control; Public Outreach & Stakeholder Engagement
- Rikki Martinez (SCJ)      Spanish Translation
- Rachel Granrath (SCJ)      Public Outreach & Stakeholder Engagement Task Lead
- Robert Mansolillo, GISP      Regulation & Zoning Task Lead
- Zakary Payne, PE      Opportunities Analysis Task Lead
- Chris Martin, GISP      GIS/Data Analysis Task Lead
- Nicole Schanel, PE      Land Development Task Lead
- Justin McBryde      Demographic, Marketing, & Housing Analysis
- Heather Garbarino      Regulation & Zoning

**Date of Proposal:**

February 8, 2023

We look forward to working with the Town on this important project. If you have any questions or require additional information, please do not hesitate to contact me at 719.575.0100 or via email at gregory.shaner@matrixdesigngroup.com.

Sincerely,  
**Matrix Design Group, Inc.**



Gregory Shaner, PE  
Vice President

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# Project Proposal

# Project Proposal

## Problem Statement

In recent years, housing costs in Paonia have risen dramatically as supply has struggled to match demand. The Town's affordability and availability challenges stemmed from a confluence of factors, including its growing populations of retirees and young entrepreneurs, an emerging short-term rental market, low mortgage rates (through 2021), and pandemic-related supply chain issues. Although prices have begun to stabilize, if not decline, they remain well above pre-pandemic levels, and concurrent increases in mortgage rates have deterred many prospective buyers from purchasing a home.

The housing market's recent volatility underscores the need to develop Paonia's first Housing Needs Assessment and Housing Action Plan. The Needs Assessment will assess the state of the housing inventory, analyze market trends, and identify current and future housing gaps. The Action Plan will primarily outline the process for forming a housing authority, recommend code revisions and other actions to promote and incentivize the construction of affordable housing, and propose strategies to close supply-demand gaps and reduce barriers. Engagement with residents (in general, but especially those from underserved populations) and stakeholders will be crucial to the success of the project. Ultimately, both the Needs Assessment and Action Plan will be integral to helping the Town maintain its status as a welcoming mountain community.

## Description of Project Proposal

Our prior work on similar housing studies has enabled us to hone our approach and methodology over time, ensuring that the Town will receive the highest quality services. Matrix's analysts and planners pride themselves on leveraging their extensive skillset to conduct thorough, concise, and robust analyses that reveal the story embedded in data, rather than confirm preconceived notions. They aim to relay this story to clients and others through compelling, yet easily understandable, data visualizations. To provide additional context to housing study results, Matrix utilizes a comparative, longitudinal approach, thereby providing perspective on how conditions have changed over time and how the community of interest is faring relative to "peer" communities. To aid local officials with planning efforts, Matrix also produces projections of future housing need using time-series forecasting techniques. An airtight quality control system complements our analyses by ensuring all findings are able to withstand scrutiny.

Data quality is key to ensuring the validity of any conclusions reached via data analysis. At Matrix, we have access to the premier sources of housing inventory and market, demographic, economic, and geographic data. We have vetted numerous potential sources, both for our prior work and in preparation for this project. Our primary data sources include the following:



A leading national commercial real estate database, CoStar allows us to examine and identify properties at the micro level. It gives us access to rents, occupancy rates, building condition, and ownership information, among other things. Our GIS team can assemble the data in a way that will be readable by GIS software. Members of our team have experience using this complex and powerful data source.



A project of the U.S. Census Bureau, the American Community Survey (ACS) provides comprehensive household, housing unit, and demographic data at a variety of geographic levels. We have experience both in mining the data and in assembling the data for GIS software optimization.

## REDFIN

Internet Multiple Listing Service (MLS) databases can be useful in tracking recent sales and comparing transaction trends in nearly real time. The Redfin Real Estate Data Center utilizes data from every locale across the country, in what is the most comprehensive single-family real estate data package available to analysts.



Matrix is a proud, vetted member of the Esri Partner Network. Esri is the global market leader in GIS technology and partners exclusively with companies that exemplify excellence in GIS and location technology. Partners are trusted practitioners of GIS and help you leverage ArcGIS technology. We support clients through our knowledge and expertise, solutions, implementation services, and dynamic content. Matrix is a GIS leader, and we are excited to offer the benefits of this unique partnership to you.

## AIRDNA

By pooling listing data from the vacation rental sites Airbnb and Vrbo, AirDNA provides an accurate portrayal of local short-term rental markets. It is widely recognized as a reliable source of data on occupancy rates, rental rates, and revenues.

Although it is critical that the data and sound scientific practices drive the analysis, we view engagements with stakeholders, the general public, and government officials as opportunities to not only confirm but also enhance quantitative findings. The Matrix team is excited by the prospect of executing a robust, comprehensive community engagement plan that emphasizes outreach to marginalized and vulnerable groups. Our multiple offices dispersed throughout Colorado will prove to be valuable assets as we begin the process of soliciting input from the community. Similarly, we believe any housing inventory and affordability study that does not articulate detailed and feasible strategies to overcome existing challenges is incomplete. The recommendations we make as part of the Action Plan will be informed heavily by an investigation of best practices, as well as our quantitative findings and engagements.

## Matrix's Interest

Matrix was founded in Colorado in 1999 and while we have opened offices in a dozen other locations throughout the country and Guam, over 70% of our employees are Colorado based. They live in the communities along the Front Range and spend their free time in various mountain towns, including Paonia and others on the Western Slope. Our mission at Matrix is to deliver *innovative solutions for a sustainable tomorrow*. A sustainable tomorrow for the communities in which we live, work and play does not exist if housing challenges are not addressed. That is why we are interested in supporting the Town of Paonia and what gives Matrix *pride in purpose*.

## Scope of Work

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### Task 1: Project Initiation & Administration

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#### *Subtask 1.1 – Kick-Off Meeting*

Matrix will host a virtual kick-off meeting within two weeks of contract award. This meeting will primarily serve to introduce key staff to Town personnel, review the proposed schedule, establish program management and communication protocols, and solicit feedback directly from the Town regarding the proposed direction of the study. We also expect to learn about any issues or challenges and to clarify roles and responsibilities of both parties.

#### *Subtask 1.2 – Status Updates*

Open lines of communication and regular dialogue are integral to building productive, long-lasting relationships that help yield high-quality deliverables for our clients. To that end, Matrix will provide monthly status reports that detail all progress made during that period, as well as any significant accomplishments or milestones that were met. If necessary, we will adjust the work plan and milestone completion dates. The team will also use these updates as an opportunity to elevate any issues or concerns that require input or assistance from Town staff.

#### Personnel Assigned to Task 1

Christian Caron, PhD

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#### Deliverables Task 1

- Kick-Off Presentation & Supporting Materials
- Status Reports

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### Task 2: Data Collection & Analysis

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#### *Subtask 2.1 – Demographic Analysis*

Housing need, in terms of quantity and type, is strongly related to a community's demographic characteristics. To that end, Matrix will provide a thorough overview of Paonia's population. To complete these analyses, we will rely heavily on the American Community Survey, which provides statistically reliable estimates of an area's population by age, race and ethnicity, veteran status, and disability status. These estimates are available for geographies as small as Census tracts, making it possible to illustrate how the size of a given demographic group varies from neighborhood to neighborhood.

In addition, Matrix is prepared to provide a detailed analysis of Paonia's households. We will break down the community's approximately 700 households by size, income, tenure, and employment status. We will further categorize renter and owner households separately into income groups based on the area median income, which was \$60,900 for Delta County in 2021, before increasing to \$68,300 in 2022. Our team also intends to separately estimate the shares of homeowners and renters who qualify as cost-burdened, meaning that 30% or more of their incomes are devoted to housing expenses.

### ***Subtask 2.2 – Economic Analysis***

The Matrix team has the substantive knowledge and technical skills needed to examine current economic conditions in Paonia. Furthermore, using time-series forecasting methods that exploit trends in historical data, such as autoregressive integrated moving average models or exponential smoothing, our quantitative analysts are able to predict whether and how these conditions will change in the coming years. Aggregate longitudinal data on labor force participation, the unemployment rate, occupation, industry of employment, and similar indicators are available from the ACS, and the Colorado Department of Labor and Employment will potentially serve as a supplementary source of data. We will also explore temporal trends in earnings, including by sector, and inflation-adjusted cost of living. To provide additional context for the findings, we will compare Paonia’s economic conditions to those of neighboring communities, broader Delta County, and Colorado as a whole.

### ***Subtask 2.3 – Overview of Housing Stock & Trends***

Matrix will leverage estimates from the ACS and CoStar, as well as parcel data from the Delta County Tax Assessor, to provide an in-depth analysis of Paonia’s housing inventory. We will present statistics on the age, condition, physical characteristics, and tenure of the community’s occupied housing units. In addition, we will provide an overview of housing density that classifies properties based on the number of housing units. In an effort to provide insight into how the inventory will change in the coming years, Matrix will acquire building permit data from the Paonia Building Department and the U.S. Department of Housing and Urban Development, which compiles responses from the 21,000 jurisdictions that participate in the Census Bureau’s Building Permits Survey.

Matrix will estimate the average cost to build various types of homes, beginning by approximating the square footage of the housing structures commonly found in Paonia. After consulting with local developers and researching the prices of building materials, we will assign an average cost per square foot of construction, which we will use to compute the total cost to build homes of differing sizes.

### ***Subtask 2.4 – Homeownership Market Analysis***

Matrix will complete an exhaustive examination of Paonia’s homeownership market. We will collect home value estimates from the ACS, while actual sales price data will come from Redfin and, if necessary, Zillow. Afterward, we will present temporal analyses of the homeownership rate, the vacancy rate and the underlying reasons for the vacancies, home prices, and inventory.

### ***Subtask 2.5 – Short and Long-term Rental Housing Market Analysis***

Matrix will similarly evaluate trends in Paonia’s rental market, which has suffered from shortages due in part to the proliferation of short-term rentals. CoStar provides rich property-level data, including address and gross rent, on complexes with four or more rental units. These data will enable our GIS analysts to pinpoint the exact locations of apartments that are affordable for households earning below a certain income threshold or that meet other criteria. The ACS complements CoStar by offering aggregate data on all types of rental units, including duplexes, triplexes, and quadruplexes, at the town and neighborhood levels. We will additionally turn to ACS data to examine rental tenancy rates, vacancy rates, and median rents over time. The final component of the rental market analysis will involve interviewing Paonia’s major internet, electric, water, cable, and gas providers to determine typical utility costs for rental units of various sizes.



### **Subtask 2.6 – Special Populations Analysis**

Matrix is committed to helping the Town better understand the housing needs of underserved groups and, ultimately, improve the housing options available to them. Our team recognizes that vulnerable populations, such as seniors and seasonal workers, often require access to supportive services in order to live as independently as possible. We are intimately familiar with the volumes of research demonstrating the ability of supportive and transitional housing to promote housing stability, reduce use of emergency health care and involvement with the corrections system, improve health outcomes, and help seniors “age in place.” Given Paonia’s growing 65-and-over population, it is especially critical that the Town has access to the latest data on senior housing for planning purposes. Matrix will take inventory of the homes suitable for vulnerable populations using CoStar and other online resources. We will use similar methods to measure the availability of workforce housing, defined as housing for which costs do not exceed 30% of household income for households earning between 80% and 120% of area median income (AMI).

### **Subtask 2.7 – Gap Analysis**

Matrix will conduct a thorough gap analysis that identifies shortfalls in Paonia’s housing inventory. At the core of this analysis will be a comparison of supply and demand at different price points for renter and owner homes separately. Using a methodology developed by the Metropolitan Center at Florida International University, we will, first, sort households into income tiers as a percentage of median income for Delta County and, second, determine the number of affordable homes in each income tier. Information on the income tiers we will use appears in the table below. Subsequently, we will use economic forecasting models to predict how demand will change in the coming years and to compute the costs of closing any identified gaps by 2028.

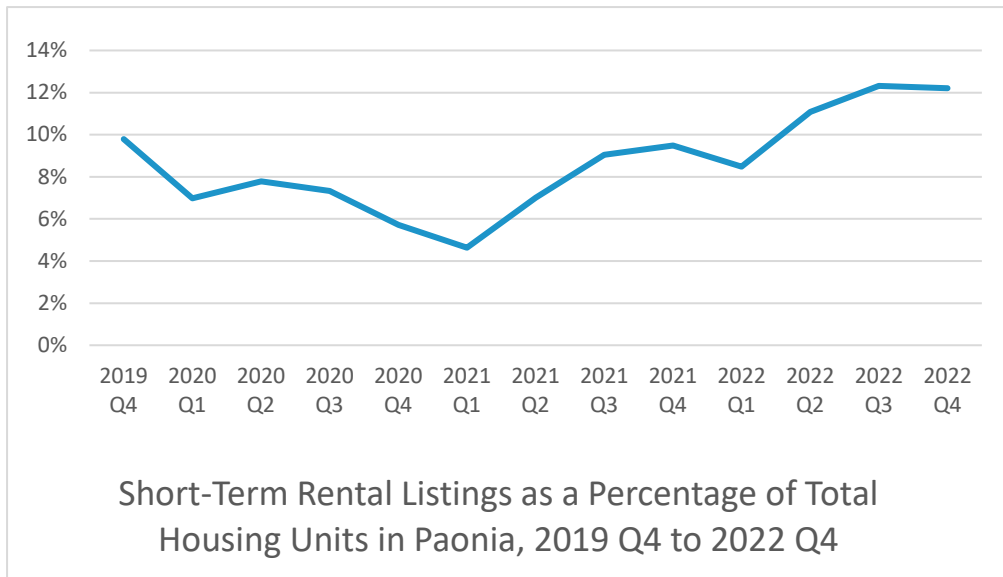
<b>Income Tier</b>	<b>Percent of Area Median Income</b>	<b>Lower Income Limit (Delta County, CO)</b>
<b>Affordable I</b>	0-30%	\$0
<b>Affordable II</b>	30-50%	\$18,270
<b>Affordable III</b>	50-80%	\$30,450
<b>Workforce</b>	80-120%	\$48,720
<b>Market Rate</b>	120-200%	\$73,080
<b>Luxury</b>	200%+	\$121,800

### **Subtask 2.8 – Barriers Analysis**

Matrix will document and investigate the factors impeding Paonia’s housing supply. Our team consists of subject matter experts in the areas of zoning and land development who are eager to leverage their significant experience and knowledge for the benefit of the Town. Matrix will conduct a comprehensive analysis of Paonia’s Zoning Code for the purpose of identifying any regulatory provisions that have exacerbated the affordability crisis by limiting the supply of duplexes, townhomes, and other forms of “missing middle” housing.

While excessive and burdensome regulations can artificially reduce the housing supply, market forces play a major role as well. Our analysis will therefore also consider the impacts of supply-demand dynamics on Paonia’s housing inventory. We will devote particular attention to the effects of short-term rentals, which are thought to particularly harm residents in search of workforce housing.

The figure below displays the results from our preliminary analysis of Paonia’s short-term rental market, showing that short-term rental listings as a percentage of total housing units reached 12% by late 2022. In the report, we will present a comprehensive overview of the short-term rental market that includes an analysis of their effects on housing availability and affordability. In a previous study, we uncovered a strong positive correlation between short-term rental listings and long-term average rent.



### Personnel Assigned to Task 2

Christian Caron, PhD; Chris Martin, GISP; Justin McBryde

### Deliverables Task 2

- Data Tables
- Maps

## Task 3: Action Plan Research

### Subtask 3.1 – Housing Authority Plan

Leveraging the experiences of other small, rural communities, the Matrix team will conduct an investigation of best practices that will culminate in a series of steps the Town can take to successfully establish a housing authority. Matrix will collaborate with the Housing Committee to outline the formation process, define the authority’s responsibilities, assist in the hiring of a qualified housing director, and identify funding sources.

### Subtask 3.2 – Affordable Housing Recommendations

Through our work on the numerous housing and affordability studies and years of experience in the areas of land development, zoning, and design regulations, our staff has accumulated the skills and knowledge needed to assess the plethora of tools available to Paonia to encourage the construction of affordable housing.

We will devote particular attention to the Paonia Zoning Code as we consider ways the Town can increase access to accessory dwelling units, incentivize short-to-long rental conversion, and encourage development of vacant properties, among other things.

We are familiar with the initiatives that other Colorado communities have implemented to ensure an adequate supply of seasonal workforce housing, such as Summit County's Lease to Locals program, and will account for their experiences in our analysis. Our projections of future housing demand will inform our recommendations as well.

### ***Subtask 3.3 – Property and Construction Cost Recommendations***

Matrix will utilize our highly experienced and capable land development and civil engineering teams to evaluate options and estimate costs. The fact that we do this in-house with Matrix talent, rather than outsourcing at additional cost, will be to the benefit of the Town.

### ***Subtask 3.4 – Strategies to Close Supply-Demand Gaps***

After consulting empirical research and weighing the viability of various options, we will propose a set of evidence-based strategies to close supply-demand gaps. Our proposed strategies are likely to require changes to the Zoning Code and property tax system, with the goal of promoting the development of underutilized or empty parcels.

### ***Subtask 3.5 – DOLA Qualifying Strategies Recommendations***

Matrix understands that a prerequisite for applying for the Incentives Grant is the adoption of a minimum of three Department of Local Affairs (DOLA) Division of Housing (DOH) qualifying Innovative Affordable Housing Strategies. Matrix has reviewed the 16 Qualifying Strategies that localities seeking to receive Incentives Grant funding can choose from and will use a data-driven approach that incorporates resident and stakeholder feedback to identify the four strategies that will best serve Paonia's vulnerable populations. A preliminary implementation plan will accompany each proposed strategy and be delivered in Task 6.

### **Personnel Assigned to Task 3**

Christian Caron, PhD; Robert Mansolillo, GISP; Zakary Payne, PE; Nicole Schanel, PE; Heather Garbarino

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## **Task 4: Community Outreach**

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### ***Subtask 4.1 – Survey Development & Administration***

The Matrix team is adept at developing surveys that elicit meaningful responses from a large, diverse set of participants on housing issues. In this case, we will design a survey that primarily assesses residents' perceptions of the housing situation as it currently exists, while also evaluating their opinions toward potential solutions. We will be particularly interested in learning about their experiences in navigating Paonia's housing market and whether they believe certain types of housing are in short supply. We will use an established platform, such as SurveyMonkey or Qualtrics, to create the survey.

To garner a large sample size, Matrix recommends advertising the survey over social media, Town websites, and other electronic methods of communication. We also see a role for community leaders, especially those with ties to marginalized communities, in encouraging participation.

### ***Subtask 4.2 – Workshops & Public Hearings***

Rigorous, thorough, and transparent public participation is a vital part of the process and is critical to the outcome of a community-supported Housing Action Plan that is inclusive of the needs of the community and region. Traditional forms of outreach could include hands-on public workshops and informative public meetings; non-traditional forms could include a public engagement ambassador program and community questionnaires. Active and passive public outreach exercises will be recommended to enhance participation. Matrix prides itself on reaching members of the community who may not have historically been part of the planning process and will provide a bilingual and ADA-compliant platform to incorporate their inputs. Early in the process, at the project management kick-off meeting, Matrix and Town staff will identify creative, innovative, and robust techniques that will maximize participation.

Our team has successfully engaged hard-to-reach, non-English-speaking populations across Colorado. We have Spanish-speaking planners and engineers who will assist with this effort. Further, Matrix employs innovative techniques to reach marginalized communities such as through local churches, schools, and community centers regarding project outreach advertisements to ensure that the predominantly Spanish-speaking community members received open house notices beyond the typical mailers and door-hangers.

### **Personnel Assigned to Task 4**

Rachel Granrath, AICP; Larry Dotson; Rikki Martinez, EIT

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### **Deliverables Task 4**

- Community Survey
- Up to two Workshops
- Up to two Public Hearings

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## **Task 5: Housing Needs Assessment Report Development**

### ***Subtask 5.1 – Draft Report***

Matrix will synthesize the relevant research into a professionally organized, edited, and graphically enhanced draft report. The report will begin with an executive summary, followed by discussions of the methodology and results. Tables and graphics will accompany the narrative throughout the document. Supplementary analyses will be included in an appendix.

### ***Subtask 5.2 – Town Board Review***

Matrix will submit the draft report to Town staff for review along with a comment resolution matrix (CRM) to record comments. Thereafter, the reviewer(s) will have approximately one (1) week to provide feedback on the CRM.

### ***Subtask 5.3 – Final Report***

Matrix will adjudicate all comments and proposed revisions submitted via CRM and, where appropriate, incorporate them into the final report. Before Matrix submits the final document, the data and analyses will undergo a rigorous quality control and verification process to ensure accuracy.

## Personnel Assigned to Task 5

Christian Caron, PhD; Larry Dotson; Chris Martin, GISP

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### Deliverables Task 5

- Draft Housing Needs Assessment Report
  - Final Housing Needs Assessment Report
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## Task 6: Action Plan Development

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### *Subtask 6.1 – Draft Plan*

Following the conclusion of our research and community outreach efforts, Matrix will carefully consider the feasibility of each initiative and then consolidate its recommendations into a professionally organized, edited, and graphically enhanced draft action plan. The action plan will outline a strategic blueprint for the future and feature detailed explanations of our recommendations. Tables and graphics will accompany the narrative throughout the document, and, if appropriate, supplementary analyses will be included in an appendix. We estimate that the process of developing the draft plan will take approximately five weeks.

### *Subtask 6.2 – Town Board Review*

Matrix will submit the draft plan to Town staff for review. Thereafter, the reviewer(s) will have approximately one (1) week to provide feedback on the provided CRM.

### *Subtask 6.3 – Final Plan*

Matrix will adjudicate all proposed CRM revisions and, where appropriate, incorporate them into the final plan. Before Matrix submits the final document, the text will undergo a rigorous review process intended to make the writing as precise and concise as possible.

## Personnel Assigned to Task 6

Christian Caron, PhD; Larry Dotson; Robert Mansolillo, GISP; Zakary Payne, PE; Nicole Schanel, PE; Heather Garbarino

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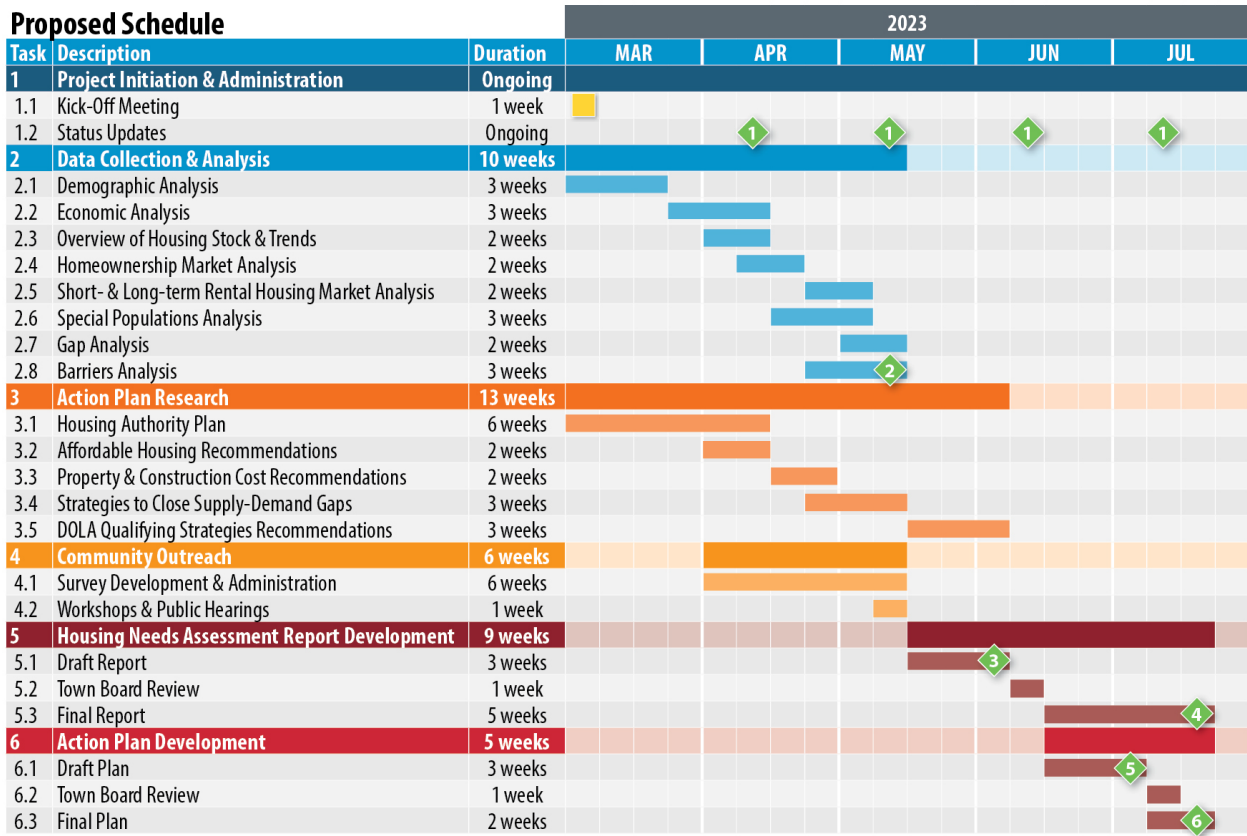
### Deliverables Task 6

- Draft Housing Action Plan
- Final Housing Action Assessment

## Project Schedule

Matrix prides itself on delivering on-time projects. Importantly, as some small changes inevitably occur over the life of a project, Matrix designs project work plans to be flexible to the needs of these project shifts. This built-in flexibility is often key to maintaining the dates of deliverables and meeting the schedule to complete the project when it is expected. Once formally selected, the Matrix team will work with the Town to validate our proposed schedule to ensure it meets their needs.

The Town will be expected to provide public facilities for holding the various engagements. In addition, Matrix will request access to any demographic, economic, or parcel data that the Town possesses.



**Legend**

■ Meeting or Presentation    ◆ Deliverable

**Deliverables**

◆ 1 Status Reports    ◆ 3 Draft Housing Needs Assessment    ◆ 5 Draft Report  
 ◆ 2 Data Tables    ◆ 4 Final Housing Needs Assessment    ◆ 6 Final Report

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# Qualifications

## Qualifications



Founded in Colorado in 1999, Matrix is an award-winning interdisciplinary firm providing economic analytics, professional planning, engineering, consulting, and program management services for both the public and private sectors. Our staff of nearly 200 professionals is recognized for its proactive and creative approach to planning and development based on our in-depth understanding of critical real estate, financial, and technical issues that are often the keys to a successful project. Matrix staff is also recognized for taking

ownership of our clients' projects and driving them to successful completion. We have assembled a team with diverse, yet complementary, skill sets to bring the greatest value to your community. For the Town of Paonia Housing Needs Assessment & Housing Action Plan, our team consists of experienced market analysts and subject matter experts to form a diverse array of talent to draw upon.

Having recently conducted similar assessments on behalf of other municipalities, Matrix appreciates the complexities of local economies, demographics, mobility patterns, and their impacts on the housing market. In the case of Paonia specifically, ***Matrix recognizes the need for any recommendations to accommodate the community's diversity of viewpoints and interests, as exemplified by its dedication to environmental stewardship; appreciation of the arts, agriculture, and journalism; and historical reliance on coal mining.*** By integrating advanced statistical computing, the best available data, and our expertise in zoning and housing policy more generally, Matrix will provide the Town with the insight it needs to meet current and future housing challenges, including those that disproportionately affect seniors and seasonal workers. Likewise, the perspective we have gained from working with rural, urban, and suburban communities on a wide range of project types, including general plans, corridor studies, multimodal plans, and others, will be an asset to the Town.

Our team members bring decades of experience, lessons learned, and honed expertise in public engagement. We understand that housing assessment work is technical in nature and requires a more specialized outreach approach when compared to other types of community planning projects. Matrix will provide an outreach approach that will translate the complex structure and terminology of housing, zoning, and subdivision regulations into simple and clear terms, allowing the stakeholders to confidently consider the potential results and safeguards of the housing action plan.

Our areas of expertise include the following:

- Housing Assessments & Plans
- Zoning Ordinances & Development Codes
- General, Comprehensive, & Area Plans
- Compatibility Planning
- Public & Stakeholder Engagement
- Alternative Energy Assessments
- Entitlements
- Landscape Architecture
- Place-Making/Wayfinding
- Site Planning & Development
- Waterfront Planning & Design
- Parks & Recreation
- Redevelopment & Revitalization Plans
- Civil Engineering
- Construction Management
- Ecological Services
- Environmental Services
- Fiscal, Economic, & Demographic Analysis
- Geographic Information Systems (GIS)
- Marketing & Communication
- Structural Engineering
- Transportation
- Water Resources
- Spanish Communication



## Housing Analysis Experts

The Matrix team features a PhD-led analytics group that specializes in housing consulting services. We have experience conducting statewide and municipal-level housing inventory and affordability analyses. Our team is adept at collating housing stock, housing market, economic, and demographic data from an array of sources; identifying patterns and trends; producing intuitive visualizations; and explaining the results in an articulate and easily understandable manner. Gap analyses employing a methodology developed by Florida International University are typically at the core of our inventory and affordability studies. These analyses, which measure the size of the housing surplus or deficit at different income levels as a percentage of area median income, help inform policymakers, developers, and other stakeholders as they decide which types of housing to prioritize going forward. Furthermore, we routinely employ GIS technology to provide detailed insight into how property values, rents, the size of the available inventory, and other metrics vary across a region. Consistent with our evidence-based approach, the results of our quantitative analyses inform the recommendations we make to improve affordability and availability.

## Land Use Code Experience

The Matrix team has successfully audited and developed traditional (Euclidian) zoning, form-based, hybrid, and smart codes and ordinances, as well as design guidelines and form-based code to help communities achieve development goals, objectives, and vision. As part of code development, we assess the substance of the code against the values and objectives outlined in policy documents and neighborhood plans. Matrix conducts on-the-ground surveys to identify desired development characteristics and ensure that new development is complimentary and supportive of the desired community vision. We also utilize award-winning engagement techniques to connect with Town staff, elected officials, community stakeholders, and residents to educate these constituents on project goals and parameters, determine community preferences, and right-size codes so they are implementable, easy to use, and scalable as communities grow.

Matrix’s interdisciplinary Planning team has extensive experience reviewing strengths and weaknesses of existing ordinances and collating and assessing previous and unfinished attempts developing functional and efficient land development codes focused on zoning standards that facilitate mixed-use development, tourism, and the protection of scenic resources. We have extensive nationwide experience amending zoning codes and members of the team also have first-hand experience developing and using traditional use-based, form-based and hybrid codes while serving in the public sector.

## Public Outreach Experts

Our planners are all trained facilitators and routinely conduct workshops, charrettes, and public hearings as part of the development of community plans. We have the experience and knowledge to translate technical information into easy-to-understand terms to provide better assessment tools for the public. In all our projects, our team leaders have facilitated successful discussions that have produced consensus-based solutions and established lasting and enhanced coordination and cooperation.



	<b>INCLUSIVE</b> <i>We engage as many members of the community as possible.</i>
	<b>INFORMATIVE</b> <i>We educate citizens and decision-makers on the process, issues, options, and solutions.</i>
	<b>VALIDATING</b> <i>We ensure that citizens and decision-makers are heard and that they see their voices making a difference.</i>

Our award-winning engagement facilitation experience crosses a broad spectrum of projects and includes traditional and non-traditional techniques to engage with diverse audiences. We utilize public workshops (in-person and virtual), stakeholder committees, project websites, in-person and web-based questionnaires, work sessions with commissions and councils, charettes, bus tours, “pop-up” meetings, on-street interviews, project ambassadors, and fact sheets. Our teams frequently attend community events. Some of our successful outreach methods are highlighted below.

Traditional & In-Person Methods		Digital / Virtual Methods	
Workshops / Community Meetings	Scenario Planning	Emails	Workshops / Community Meetings
Pop-up Meetings	Focus Groups	Website	Focus Groups
Surveys	Church Groups	Virtual Open House	Ambassador Toolkit
Ambassadors	Open Houses	Social Media / Digital Ads	Virtual Listening Sessions
Traditional Ads	Key Informant Interviews	Livestreamed Meeting	Guest Speakers
Flyers	Guest Speakers	ID Places App	
Postcards	Translated Materials		
Media Coverage			

***Our comprehensive outreach efforts get results!***  
***Outreach for this general plan update led to 267,000 impressions among the community.***



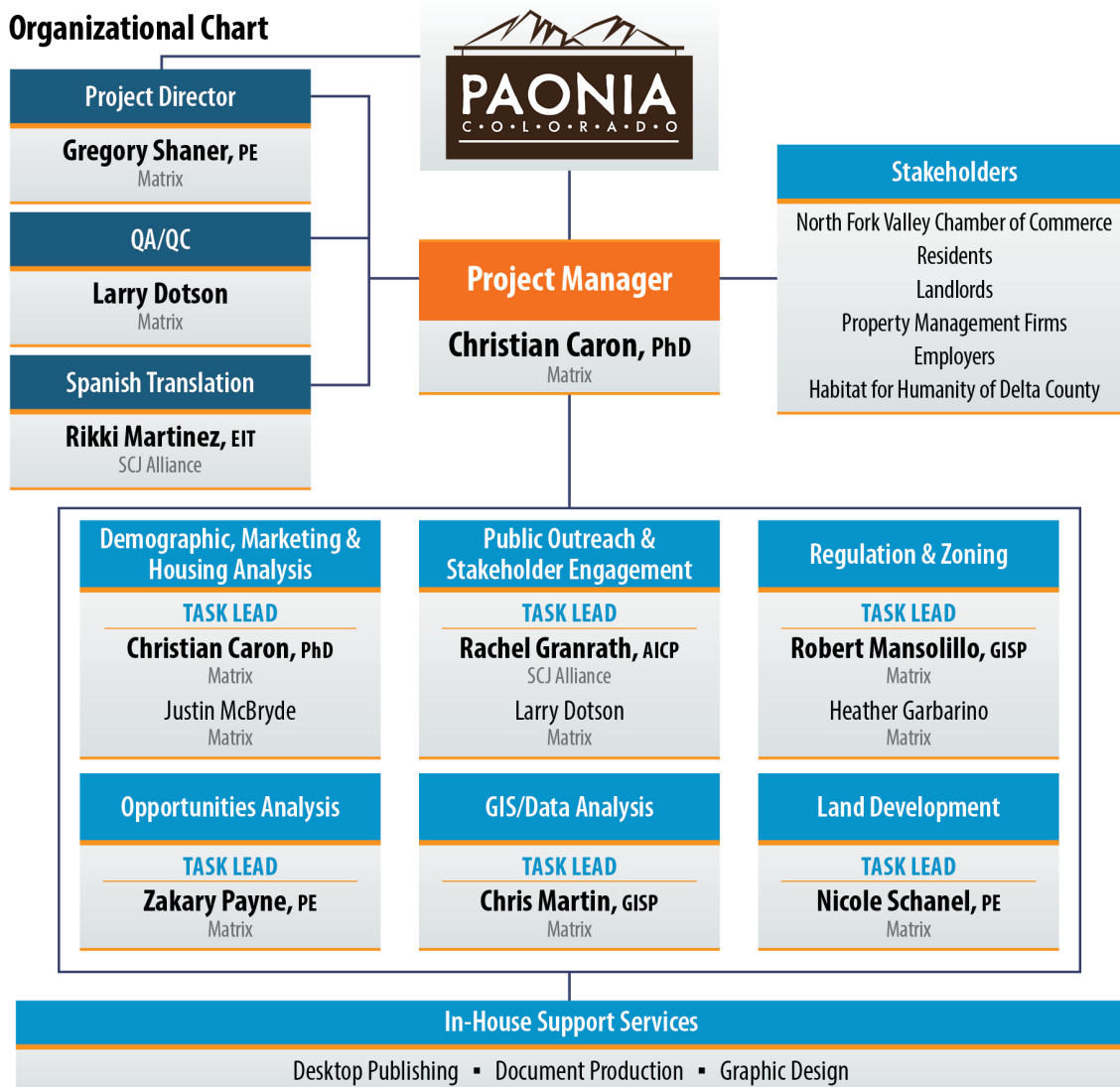
## Professional Staff

Matrix will provide the Town of Paonia with a cohesive project team that has extensive experience working together on similar projects. Senior staff members will manage staff assignments and services. **Gregory Shaner, PE, Project Director**, will ensure that the necessary resources are available and used efficiently and effectively for the successful delivery of the assessment and action plan. Gregory provides a solid broad-based platform for his clients that allow him to provide perspective and offer solutions that encompass all specialties within Matrix. **Christian Caron, PhD, Project Manager**, will collaborate with Town representatives to coordinate and manage each task to best fulfill the goals and objectives of the project. Enhancing our team is SCJ Alliance, a full-service professional planning and engineering services firm that specializes in strategic planning and has developed numerous housing plans and studies.

The organizational chart below shows the key personnel who will be involved in this project followed by key personnel bios. Detailed resumes, showcasing credentials and experience, are provided at the end of our proposal in the **Resumes Section**.

### Matrix Team

#### Organizational Chart



## Key Personnel

### Gregory Shaner, PE

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#### Project Director

**Why Gregory?** Gregory is an independent thinking, award-winning engineer, often tasked with finding creative solutions to difficult problems. His experience includes overseeing the procurement, entitlement, design, and construction management for private and public projects. Gregory provides a solid broad-based platform for his clients that allows him to provide perspective and offer solutions that encompass all specialties within Matrix. Gregory spent nearly 14 years in western Colorado assisting clients and communities from Meeker to Rifle to Vail and the Greater Western Slope area, and recently completed a project for the Pueblo Housing Authority on their redevelopment of Section 8 Housing.

### Christian Caron, PhD

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#### Project Manager; Demographic, Marketing, & Housing Analysis Task Lead

**Why Christian?** Christian has a distinguished research record, having published several articles in highly selective peer-reviewed scholarly journals and served as technical lead on the Tempe Housing Inventory and Affordability Analysis and Florida Housing Availability and Affordability Study. Before joining Matrix, he completed a PhD in Political Science at UNC Chapel Hill, where he specialized in state and local government, public policy, and economic analysis. He is excited to leverage his vast substantive knowledge of housing and technical expertise in advanced data science, statistical computing, and research methodology for the benefit of the Town.

### Larry Dotson

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#### Quality Assurance/Quality Control; Public Outreach & Stakeholder Engagement

**Why Larry?** Larry brings more than **35 years** of planning and project management in the country's public and private sectors, addressing a range of community planning, land development, and sustainability initiatives. He is an active member of the American Planning Association, with a master's degree in Urban and Regional Planning, and is **bilingual in English and Spanish**. He regularly shares his knowledge through public presentations on a range of topics, including community sustainability, land use planning, public policy, economic development, and transportation.

### Robert Mansolillo, GISP

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#### Regulation & Zoning Task Lead

**Why Robert?** Robert has **17 years** of combined experience as a planner and GIS analyst in both the public and private sectors, effectively serving urban and rural communities. He has worked on state-level development regulations mandated by legislation to provide more housing options in cities. This included allowing duplex, triplex, quadplex, townhouse, and cottage developments as by-right allowed uses in single-family residential zoning districts. In this role, he fostered relationships with the public, community leaders, and elected officials. Robert's background includes land development, zoning entitlements, statewide zoning code updates, and design regulations. He is skilled at performing public outreach, conducting workshops, and presenting to governing bodies.

## Zakary Payne, PE

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### Opportunities Analysis Task Lead

**Why Zakary?** Zakary is a results-oriented leader known for his creativity and innovation. He is responsible for leading a team of 14 professionals focused on successfully executing project requirements for local, state, and federal government partners. Zakary specializes in providing consulting support that includes asset management, process improvement, facilitation, strategic planning, and development of actionable recommendations that move client organizations forward.

## Chris Martin, GISP

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### GIS/Data Analysis Task Lead

**Why Chris?** Chris has 20 years of professional experience in the GIS field, providing support in both the public and private sectors on diverse projects including demographic and housing analysis, transportation modeling, housing suitability siting, asset management, financial analysis, and capital planning. Chris has extensive experience leveraging GIS for various community projects and is adept at developing GIS-based digital products to facilitate stakeholder and public outreach efforts.

## Nicole Schanel, PE

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### Land Development Task Lead

**Why Nicole?** Nicole is a dynamic, critical-thinking engineer with over 10 years of progressive civil engineering experience with private and public-sector clients. As land development task lead, she brings solid proven experience in a holistic approach to community planning and development. Recognizing the needs of various stakeholders in the process, Nicole’s diverse design background lends to creative win-win solutions regarding design for site grading, roadway, drainage, and utilities.

## Rachel Granrath, AICP (SCJ)

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### Stakeholder Task Lead

**Why Rachel?** Rachel is a strong believer in placemaking and assisting clients to realize their potential and vision through the public planning process. She specializes in facilitating and managing complex groups and interests to achieve a comprehensive planning effort. Her skills include development and plan review, downtown planning, economic development, community engagement, long-range planning, redevelopment and infill, grant writing, and floodplain management. Drawing from her experience in rural and urban communities, she excels in developing strategies, visual tools, urban design, and guiding a community from start to finish through an inclusive planning process.

## In-House Support Staff with Advanced Capabilities

Matrix has all the ***in-house support services and production capabilities needed*** to prepare the Housing Needs Assessment & Housing Action Plan. We excel at technical editing, quality assurance/quality control, document production, and graphic design and have designated teams in each area of practice.

### QA/QC

Our QA/QC will be led by Larry Dotson, who brings Colorado zoning experience and knowledge of housing policy and zoning law. He is knowledgeable about what is supported by the development community, both from a political and administrative standpoint. Our QA/QC programs ensure all deliverables meet client standards and, in turn, best meet community needs. The programs ensure contract compliance, data security, and the comprehensiveness, clarity, accuracy, accessibility, and functionality of all deliverables.

Matrix also works closely with the community's legal counsel to validate all proposed development codes and review processes in terms of being legally compliant, enforceable, severable, and defensible.

### 3D Visualization and Modeling

Matrix creates 3D renderings for public participation using a variety of tools. Our GIS team can create renderings in ArcGIS Pro or City Engine and online using ArcGIS Urban or ArcGIS Online 3D maps. Our Graphic Design team creates 3D renderings in Sketchup, while our Landscape Architecture team uses Sketchup and Lumion. We are knowledgeable, skilled, and versatile, able to meet any rendering needs using the most appropriate and powerful tools available.

### Graphic Design

Matrix's professional Graphic Design team are experts at coalescing vast amounts of data into small, concise, and easily understood formats. They are particularly adept at refining a significant amount of information into aesthetically pleasing, eye-catching documents. Our team also has the know-how to develop document layouts and designs that are simple to follow and easy to amend as development regulation needs evolve.

### Workshop Exercises

Peoria is projected to add over 100,000 people by 2040.

#### Where should:

- Growth be targeted for housing, commercial, and employment?
- Infill and redevelopment occur?
- Transportation improvements be focused?
- Trails be located?
- Future public transit routes be located?

#### Exercise 1

##### Neighborhood Survey

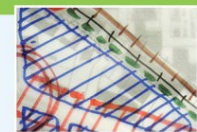
- What makes a great neighborhood
- 33 common features
- Rank each from very important to not important
- Add your own

#### Exercise 2

##### Growth Areas

- Housing / Neighborhood
- Commercial Mixed Use
- Employment
- Redevelopment / Infill

- Green Marker
- Red Marker
- Blue Marker
- Brown Marker



#### Exercise 3

##### Transportation Priorities

- Red Marker
- Intersections Improvement
- Interchange
- Overpass

- Red Yarn
- (Parkway, Arterial) Cost constrained 1 inch = \$15M/Block
- Top Priority Years 1-5
- Yellow Yarn
- Transit Corridors
- Blue Yarn
- Trail Corridors



#### More information:

www.planpeoriaaz.com  
 Lorie Dever, Senior Planner, City of Peoria  
 Email: planpeoriaaz@peoriaaz.gov  
 Phone: 623-773-7200



### Production

We have top-notch production and high-quality printing and plotting capabilities for preparing all meeting materials and final documents, reducing downtime associated with outsourcing, and providing a cost-saving efficiency for clients.

## Similar Projects

Several Matrix team members have served as city/town employees, and all have significant experience as private consultants for communities across the country. Our work has evolved with increasing local and national experience and with the ability to draw on best practices and lessons learned to develop locally tailored, innovative solutions to place-specific problems.

We have presented a selection of representative work samples on the following pages that demonstrate our experience and our ability to execute your project successfully.

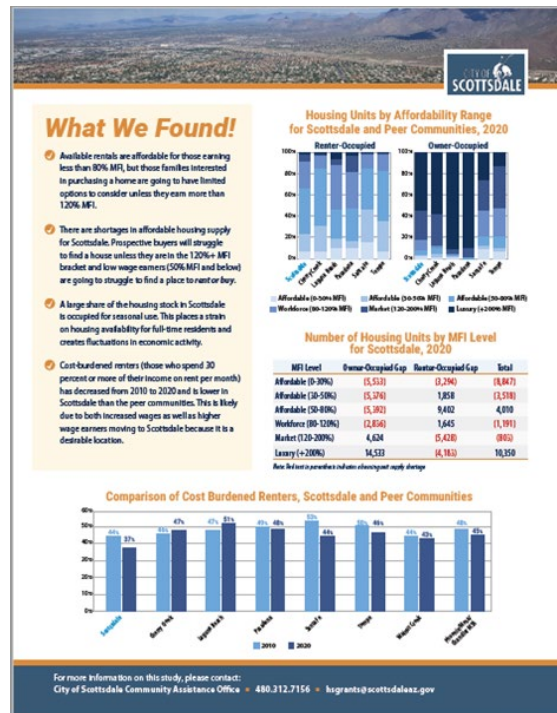
## Scottsdale Housing Inventory & Affordability Analysis | Arizona

Matrix was retained by the City of Scottsdale to perform a **housing inventory and affordability analysis** incorporating a methodology developed by Florida International University wherein housing and demographic data generated by the U.S. Census is used as the baseline. Utilizing this framework, the city would be able to update the study in future years in a manner that utilizes **consistent data collection techniques and data integrity protocols**, as well as identical analytic processes to ensure year-over-year comparisons remain consistent and repeatable.

Matrix utilized the 2020 American Community Survey (ACS) 5-year estimates to perform a variety of analyses looking at various factors including **demographics, owner-occupied and rental housing availability, and affordability** as a percentage of the Median Family Income (MFI) whereby 0 to 80% of MFI is considered affordable. In addition to examining city-wide, Scottsdale-specific data, Matrix also performed various comparative analyses within the city by zip code, within the Phoenix-Mesa-Chandler Metropolitan Statistical Area (MSA), and across the “peer” communities of Cherry Creek, CO; Laguna Beach, CA; Pasadena, CA; Santa Fe, NM; and Tempe, AZ.

Matrix employed a standardized, repeatable methodology developed by the Metropolitan Center at Florida International University that leverages publicly available data from the American Community Survey (ACS) and US Department of Housing and Urban Development (HUD) as the basis of the analysis. The methodology focuses on several factors like demographics, current housing stock, and ownership and rental market trends to generate a **supply-demand gap analysis** focused on various affordability limits based on median family income (MFI). The results of the analysis were captured in a report, along with a two-page strategic communication product summarizing the effort in an easily digestible, graphically intensive product.

The main takeaway of the analysis is that there is a gap in affordable housing (both renter and owner-occupied) in the city. While some affordable rental options exist for those earning between 30% and 80% MFI, there are a dearth of options for those making less than 30% MFI and a shortage of owner-occupied housing units at all affordability levels.



Addressing these gaps should be a priority for the city should it desire to be viewed as affordable for low-income earners. Armed with this information and other analysis in the report, the city will be able to **focus their resources and policies** on improving or addressing some of the concerns captured within.

The results of these analyses were summarized in a housing inventory and affordability report, along with a **graphically rich strategic communication brochure** that captures the highlights of the report in a concise, easy-to-understand document.

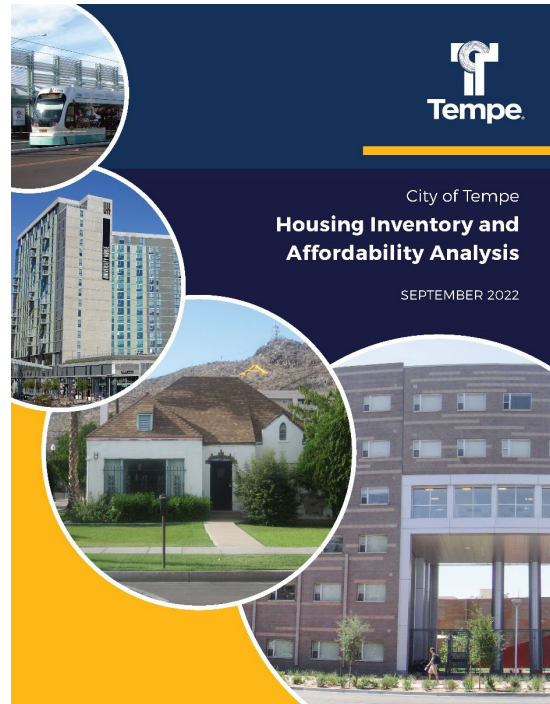
## Tempe Housing Inventory & Affordability Analysis | Arizona

The City of Tempe retained Matrix to conduct a **housing inventory and affordability analysis** to help the community understand the distribution and categorization of the city's occupied housing stock (rental and owner-occupied) as it relates to **quantity and affordability**. Matrix employed a **standardized, repeatable methodology** developed by the Metropolitan Center at Florida International University that leverages publicly available data from the ACS and U.S. Department of HUD as the basis of the analysis. The methodology focused on several factors like **demographics, current housing stock, and ownership and rental market housing availability and trends to generate a supply-demand gap analysis** focused on various affordability limits based on median family income (MFI).

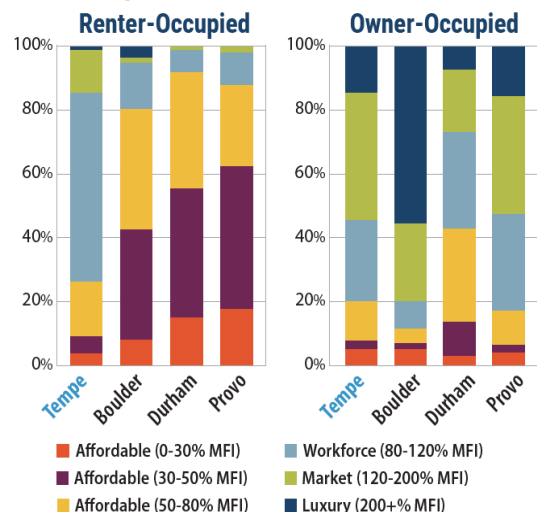
In addition to examining city-wide, Tempe-specific data, Matrix also performed various **comparative analyses** within the city by zip code, within the Phoenix-Mesa-Chandler Metropolitan Statistical Area (MSA), and across other college towns like Boulder, CO; Provo, UT; and Durham, NC. The main takeaway of the analysis is that there is a gap in affordable housing (both renter and owner-occupied) in the city and that addressing this gap should be a priority, especially given the large student population of Tempe with limited or fixed incomes.

The results of these analyses were summarized in a **housing inventory and affordability report, along with a graphically immersive strategic communication product** that captures the highlights of the report in a concise, easy-to-understand document.

**When asked for feedback on the final report, City of Tempe Deputy Human Services Director, Irma Hollamby Cain, MPA, stated "I think Dr. Caron nailed it. I have no further feedback."**



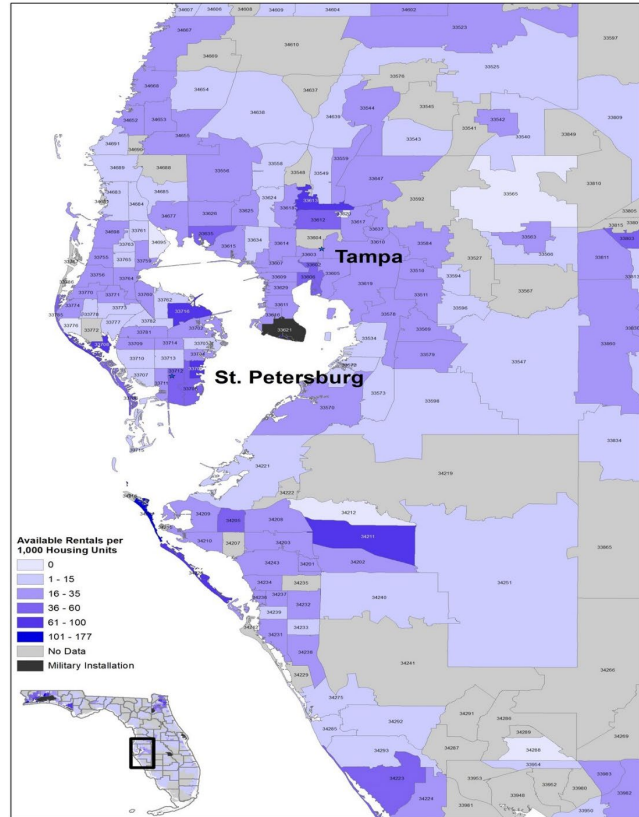
**Housing Units by MFI level for Tempe and Peer Communities, 2020**





## Florida Housing Affordability and Availability Study | Florida

Matrix recently completed a study on behalf of the Florida Defense Support Task Force (FDSTF) with the primary purpose of proposing feasible solutions to the housing affordability and availability crisis facing the state’s defense communities. The project’s broad scope meant that the Matrix team was required to execute a complex, multistep research plan. Given the localized nature of housing policy, initial efforts focused on determining the regions of the state that faced the most acute crisis and therefore deserved priority in the report. Our researchers collected and analyzed data from a variety of sources, including the American Community Survey, Redfin, and CoStar, in an effort to identify high-active-duty population zip codes with inadequate Basic Allowance for Housing rates. Additionally, we created a series of heat maps that classified zip codes based on the severity of the military housing crisis.



Our team then explored solutions, tailored to each defense community, for policymakers and stakeholders to pursue and implement. This process entailed, first, studying existing state and local housing laws—including those pertaining to zoning, taxation, developer incentives, short-term rentals, and vacant properties—and second, identifying appropriate and achievable reforms. The latter task required us to thoroughly review previous housing studies to identify best practices across the U.S. Throughout the research process, we relied on points of contact established at Florida’s military installations, state and local housing authorities, and other stakeholder institutions.

At Matrix, we believe client and stakeholder feedback are critical to producing high-quality products. Prior to beginning the project, our team held a kick-off meeting, where FDSTF had the opportunity to review and comment on our plan of action. We continued engaging the multi-stakeholder FDSTF board of direction throughout the project timeline. Examples of feedback and communication tools at our disposal include regular briefings, brainstorming sessions, newsletters, and a project website.

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*When asked for feedback on working with Matrix, Florida Defense Support Task Force Vice President of Military and Defense Programs, Terry McCaffrey, stated “Matrix has done several projects for us including economic impact studies, resiliency reviews, and military housing analyses... I highly recommend them.”*

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## Lochbuie Comprehensive Plan and Land Development Code Update | Colorado

The Town of Lochbuie, Colorado is a rapidly growing suburban community in the northeast portion of the Denver metro area, with a reported growth rate of 14% from 2010 to 2015. Matrix Design Group was hired to develop a new comprehensive plan and land development code in the summer of 2016 to help establish a vision, goals, policies, and zoning regulations.

The plan addressed the rapid pace of growth and provided guidance on how to mitigate the impact on residential areas. Matrix also helped to establish land use planning for a new town center as a vertical mixed-use district anchored by Town Hall. The plan helped to define streetscape enhancements within the Main Street area to create a vibrant, walkable downtown with pedestrian-focused activities and established mixed-use residential, commercial, and employment gateway areas based on market and economic analysis.

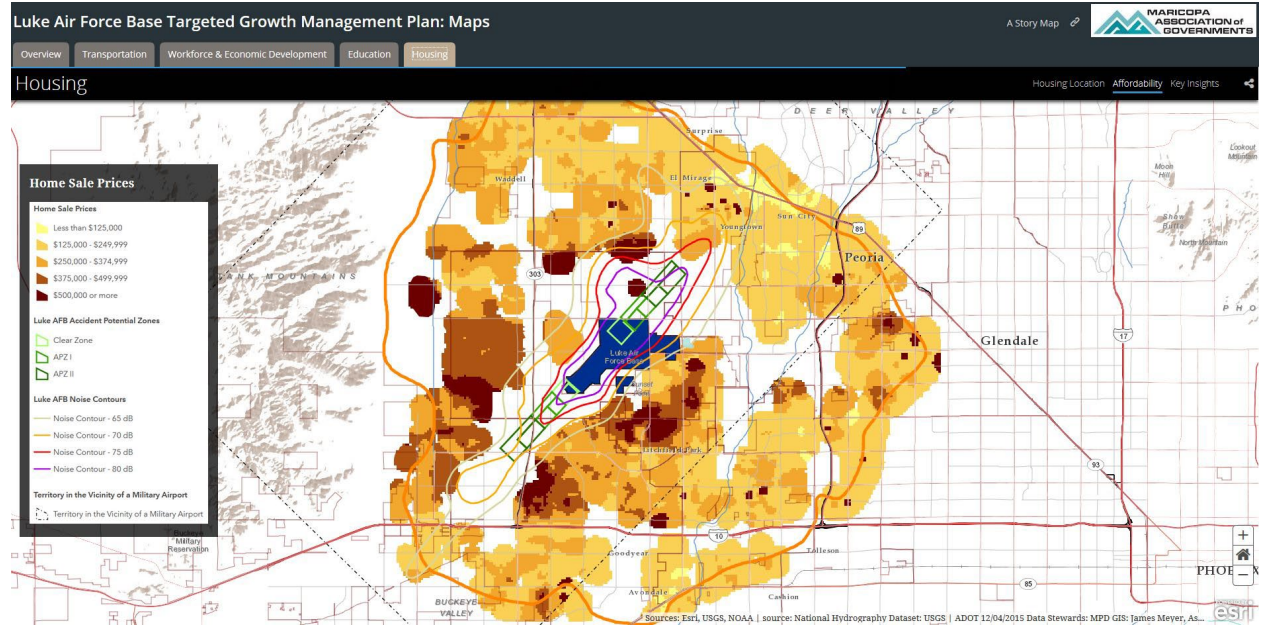
Simultaneous development and adoption of the comprehensive plan and land development code enabled high compatibility between the documents, resulting in a plan and code that are user-friendly and consistent and cover various topics, including land use, economic development, redevelopment/revitalization, and infrastructure. Additionally, Matrix incorporated a robust implementation plan to provide a framework for Lochbuie, guiding future development of the town.

***Matrix provided expansive public outreach and engagement, encouraging widespread public support and well-attended workshops.*** The efforts by Matrix resulted in the plan's subsequent adoption and support by Mayor and City Council.



## Maricopa Targeted Growth Management Plan, Housing White Paper | Arizona

Matrix completed a Targeted Growth Management Plan (TGMP) for Luke Air Force Base, which is a community-led, collaborative planning effort between Maricopa Association of Governments, Luke Air Force Base (AFB), and surrounding jurisdictions. The purpose of this plan is to measure the impacts of the coming expansion of Luke AFB due to its designation as the new F-35A Lightning II fighter jet training facility. The Housing White Paper addressed the potential impacts of the mission expansion on the housing supply in nearby communities and examined the ability of those communities to meet the anticipated increased additional demands on housing of all types. This report tied into results of additional white papers on Transportation, Education, and Economic and Workforce Development.



Evaluation of the state of housing in the Study Area focused on the existing and projected housing market and inventory including regional growth areas, the projected demographic associated with growth at Luke AFB and anticipated housing need, and potential areas where that housing need may be accommodated in the communities surrounding Luke AFB. Matrix used the results of community-wide and Luke AFB surveys, conducted online during the study period, to gauge housing preferences of residents of nearby cities and Luke AFB.

A key product of the TGMP was an online story map which included a summary of the findings of the study as well as population growth trends and interactive maps indicating locations of current military personnel and affordable housing. This served as an ongoing method of educating public agencies and members of the public in a way that is meaningful and understandable.

The TGMP was funded by the Department of Defense (DoD) Office of Economic Adjustment and functioned to ensure that the expansion of Luke AFB could be accommodated by the community at large and to create an action plan to mitigate any potential negative impacts.

## Mesa East and West Redevelopment Area Plan | Arizona

Matrix assessed 4,990 properties covering more than three square miles in Mesa to assist the City with establishing two redevelopment areas (RDAs)—the East RDA and the West RDA. These RDAs expanded the Central Business District outward from the original Town Center RDA, which covers Downtown Mesa. Establishing the East and West RDAs provided redevelopment tools and economic incentives for revitalizing the primary gateways into Downtown Mesa and along the Valley Metro light rail corridor on Main Street. Matrix used Fulcrum software while conducting a field survey to concisely and accurately assess all 4,990 individual properties across the two RDAs. Property conditions, descriptions, and photos of each individual parcel from the Maricopa County Assessor's office were entered directly into the Fulcrum application while in the field, creating a well-organized and easily searchable database of each property.

Upon the successful establishment of the East and West RDAs through a unanimous Council decision, Matrix developed redevelopment plans for each RDA. These plans included targeted revitalization strategies that addressed issues identified in the Fulcrum application during the field survey, including housing conditions and affordability. In addition, Matrix developed conceptual redevelopment nodes at key focal points in each RDA to act as catalyst developments spurring revitalization efforts. One such node – the Asian District, Mesa – has already begun to emerge around Mekong Plaza through successful partnerships between the City of Mesa and local community and business leaders.

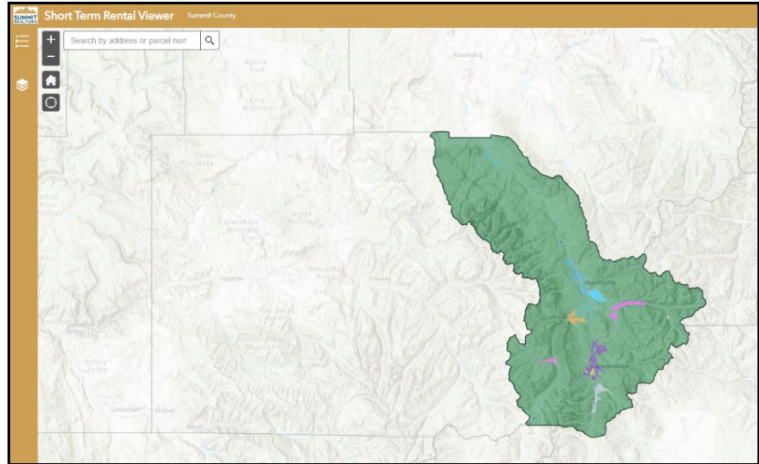


The City of Mesa sought Matrix's assistance again two years later to evaluate blight conditions in all four of the City's RDAs following state legislation (ARS §42-6209) requiring municipalities to review all originally designated RDAs. Matrix evaluated a total of 8,260 properties encompassing six square miles across the four RDAs using the Fulcrum application. All four RDAs were successfully re-established by City Council before the deadline provided in state statutes.

*These RDA plans positioned the community to implement action with tangible, feasible strategies and guidelines for transforming targeted areas into strong, vibrant, and economically sustainable employment centers with a healthy mix of retail and light industrial uses.*

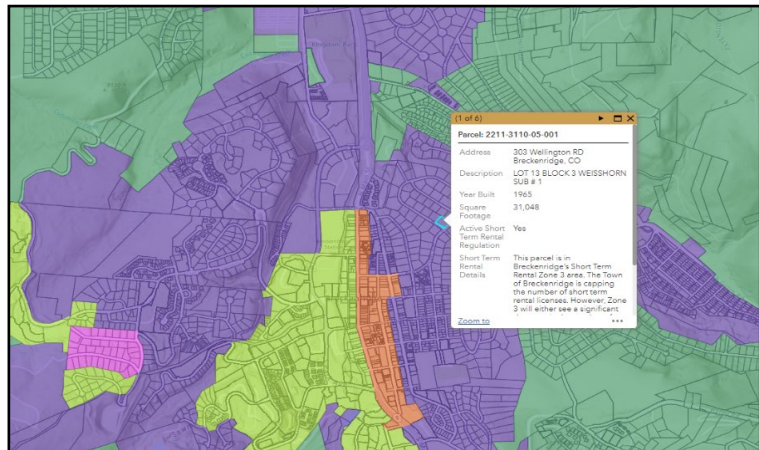
## Summit Association of Realtors Web Mapping Application | Colorado

Matrix created a web mapping application to help realtors navigate the changing regulations of short-term rental properties in Summit County, Colorado. As the County places restrictions on the number of properties allowed to offer short-term rentals through platforms such as Airbnb, the Summit Association of Realtors partnered with Matrix to create a streamlined tool to disseminate the regulations.



Using ArcGIS Online, our team built an online, interactive web map displaying all property parcels and municipality jurisdictions within Summit County. Short-term rental regulation information was compiled for each municipality and overlaid with property parcels. The result produced a GIS parcel data layer that included not just the corresponding town’s rental regulations, but all data associated with the parcel such as acreage, address, most recent sale, and more. This provided realtors with a one-stop-shop of information about properties of interest. Moreover, Matrix overlaid additional map layers of interest, such as hiking trails, open spaces, resort areas, and ski lifts.

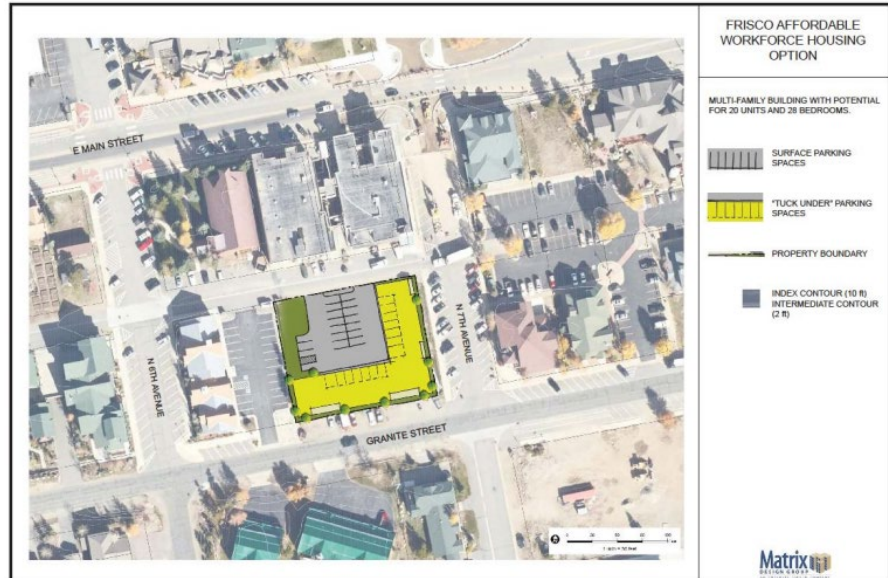
To ensure that this application provided realtors with the most up-to-date information, Matrix used rest service URLs of the local municipalities to connect to their most up-to-date short-term rental GIS data. In doing so, any updates made would be automatically reflected in our application. Moreover, Matrix implemented programming tools to automatically detect and notify our team if any hyperlinks to short rental information had changed so that adjustments to the tool could be made. Overall, this interactive web map provided Summit Association of Realtor’s clients with an easy-to-use, integrated tool to assist with real estate decision-making.



## CDOT Work Force/Affordable Housing Evaluation | Colorado

Matrix worked with an economist and the Colorado Department of Transportation (CDOT) to identify existing sites that could either be re-purposed for work force housing or as an existing site that could be demolished, and new higher-density housing constructed. The workforce housing study looked at the maintenance facilities in Basalt (Pitkin County), Grand Junction (Eagle County), and Summit County and considered development opportunities

for each location. Each development opportunity was considered in terms of feasibility, risk, initial costs and long-term cost benefits, as well as in comparison to a stipend only solution. In Basalt, the study looked at a land trade with the Town, an opportunity for CDOT to buy into housing being constructed by a local developer, and CDOT building housing units on existing CDOT land. The Dowd Junction area explored development on a Forest Service parcel in Minturn with both housing built by CDOT as well as housing built by an outside developer. In Summit County, the study analyzed opportunities with the Town of Frisco, Summit County, and the Forest Service to partner on different housing developments. As part of this effort, Matrix reviewed sites in Basalt, Frisco/Dillon, and Minturn and evaluated from a site plan perspective to determine number of units and cost of infrastructure along with zoning, adjacent uses, suitability for housing, drive time to CDOT facilities, and costs.



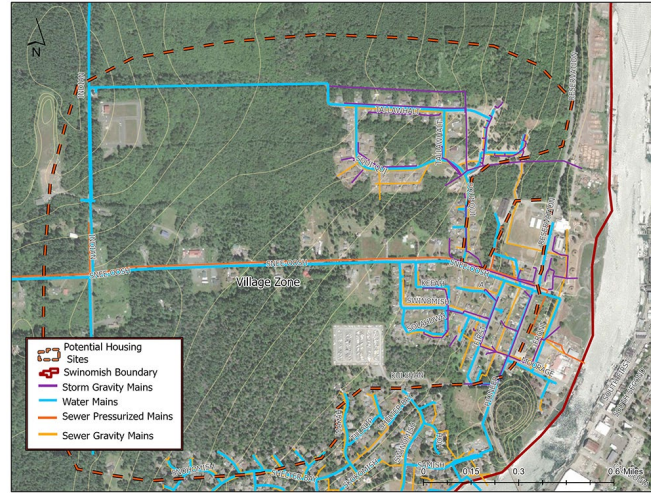
## Okanogan Regional Housing Action Plan | Washington

SCJ helped to conduct this housing needs study for Okanogan County, Washington, to help community leaders plan for and facilitate the development of housing for the region's 42,000+ residents. The study encompasses a quantitative assessment of supply and demand, a qualitative assessment of community members' preferences, and review of current planning and building practices that are suitable for predominantly rural counties in Washington state.



## Swinomish Housing Strategic Plan | Washington

The Swinomish Indian Tribe faces a shortage of adequate and affordable housing options, one that is so severe that the Tribal Senate passed a Resolution declaring a Housing Crisis on the Swinomish Reservation. SCJ was hired to complete a Strategic Housing Plan to help the Tribe better understand housing patterns and housing needs within the Reservation, especially with a focus on where housing investments would serve the greatest need. State and federal government data on these topics is generally inaccurate and misleading for our community so SCJ has used a variety of analytical techniques, including surveys and GIS studies to more accurately identify, define, and resolve this crisis. The plan will have a clear action plan to address the housing supply crisis and is expected to be completed in 2022.



## Downtown Plan, Housing Action Plan, and Code Updates | Washington

The Downtown and Housing Subarea Plan was identified as a community priority and area of study after completing the City’s Comprehensive Plan Update. The implementation of the project was realized when the city was awarded grant funding from E2SHB 1923. The study was focused on two primary areas. The first was the downtown area on Main Street and Park Street. The downtown portion of the plan analyzed land use trends, studied the differences between the main street district and the highway corridor development, and produced code provisions for the downtown overlay zone. Zoning overlay provisions improved parking, enhancements for future downtown development, identified pedestrian amenities and improvements, and connected the Chewelah Walking Trail to downtown. The second area of study was residential development in the downtown and the medium-density residential zoning district surrounding downtown within the subarea boundaries. The plan resulted in an action strategy that included new code provisions for the downtown area housing, alignment of the Chewelah Walking Trail, improving the Civic Center as the city hub, and transition space from the residential areas to the downtown main street.



## Subconsultants



SCJ Alliance (SCJ) is a full-service professional planning and engineering services firm specializing in strategic planning and solving complex issues that challenge developing communities. SCJ has worked on many housing plans and studies, oftentimes focusing on specific elements or future visions for communities. Creative strategies are needed to address the shortage of missing-middle housing, size/type/style, racial and economic inequities, and so much more. They have participated as the grant writer, administrator, engagement lead, and project lead for many of these efforts and worked to complete the project on budget and on time. Their team is well-versed in state regulations and planning efforts in the west including Colorado, Washington, Idaho, and Montana. Team member Rachel Granrath's career has been in both the public and private sectors, working for various cities and towns in Colorado where she served in many capacities including as the Community Development Director with the City of Cherry Hills Village and the Town of Elizabeth. Rachel has also led community outreach efforts in the state. Team member Rikki Martinez is passionate about building community and is a skilled bilingual mediator and facilitator. With three offices in Colorado (Boulder, Crested Butte, and Gunnison), Rachel, Rikki, and SCJ are prepared to commence immediately upon selection for this contract and can meet the project requirements.

## References

Matrix is committed to providing the highest quality service and we are proud to refer you to our clients to validate our capabilities. We have reliably served numerous private and governmental agencies in Colorado and throughout the country under similar consulting roles. Per the RFP requirement, the tables below list two professional references that can attest to our performance in recent years. We highly encourage the Town to contact our clients to confirm our capabilities, as well as our overall commitment to quality.

### Tempe Housing Inventory & Affordability Analysis

<b>Organization</b>	City of Tempe Human Services		
<b>Contact</b>	Irma Hollamby Cain, MPA	<b>Phone</b>	480.858.2264

A summary of the work is provided in the [Similar Projects Section](#) above.

### Florida Housing Availability and Affordability Study

<b>Organization</b>	Enterprise Florida, Inc.		
<b>Contact</b>	Terry McCaffrey	<b>Phone</b>	850.298.6652

A summary of the work is provided in the [Similar Projects Section](#) above.



## Current Workload and Ability to Complete the Project on Time

We use several methodologies to ensure the availability of staff and resources to meet our client's needs. First, we prepare long-term (6-month) backlog projections to evaluate staff availability and assess hiring needs. Second, we track near-term (1-month) resource loading to identify and address conflicts and achieve project delivery. Finally, we revise immediate needs for staff and resources as part of weekly staff meetings.

With over 120 Colorado-based personnel, Matrix has the reach-back capabilities needed to quickly mobilize subject matter experts, support staff, and other resources to address unforeseen challenges, surge needs, or a redirect of efforts as our clients require. Our approach, in which *we commit only what we can achieve and achieve all that we commit*, ensures that our clients have the support they need when they need it.

The Town will benefit from well-crafted, experience-based project plans and deliverable schedules. We review the plan and schedules frequently to proactively identify and resolve potential issues.

Matrix is confident that your project can be incorporated into our current workload and commit to high-quality project delivery. The team we propose is in place, ready to start immediately, and can meet your target completion date of July 31, 2023.

# Resumes



## Gregory Shaner, PE

### Project Director

Gregory is a Vice President with Matrix and the Director of Civil Services for Colorado. He is a licensed professional engineer in Colorado and has more than 27 years of experience in the civil engineering and development industry. Gregory spent nearly 14 years in western Colorado assisting clients and communities from Meeker to Rifle to Vail and the Greater Western Slope area. His experience includes overseeing the procurement, entitlement, design, and construction management for private and public projects. Gregory provides a solid broad-based platform for his clients that allow him to provide perspective and offer solutions that encompass all specialties within Matrix.

His technical experience includes program management and owners' representation, federal and state project development, project site assessment, urban planning, and infrastructure design.

### Relevant Experience

#### **Pueblo Housing Authority | Pueblo, Colorado**

As the Senior Project Manager, Gregory has been involved with the Pueblo Housing Authority on their redevelopment of Section 8 Housing in Pueblo, Colorado. The project includes extensive community outreach, project phasing planning, scrape and demolition of existing housing, and design and construction of new housing that meet solar and low impact initiatives.

#### **Engineering On-Call Municipal Services | Various, Colorado**

Gregory has served as the Civil Engineer for multiple on-call municipal service contracts within Colorado. Through these contracts, he has worked on a variety of projects from multiple funding sources including Safe Routes to School projects, regional trail projects, providing stormwater and roadway reviews, regionalization planning reviews, and architectural/engineering contracts. Some of the on-call services contracts have been performed for:

- Colorado Springs Utilities
- Pueblo West
- Town of Monument
- City of Aspen
- City of Colorado Springs Stormwater Enterprises
- Granby Ranch Metropolitan District
- City of Fountain

#### **Historic Arkansas Riverwalk Plaza Development | Pueblo, Colorado**

Matrix has been associated with the HARP project in downtown central Pueblo for over 20 years. As the Senior Civil Manager for the project over the past six years, Gregory has been instrumental in the design and construction of the Gateway Plaza, Convention Center expansion, Main Street improvements, and current channel extension to Santa Fe. Projects involve detailed downtown redevelopment planning and engineering efforts for the relocation of major City infrastructure, roadway closures and right-of-way vacation, and coordination with multiple jurisdictional entities and utility providers.

### Areas of Expertise

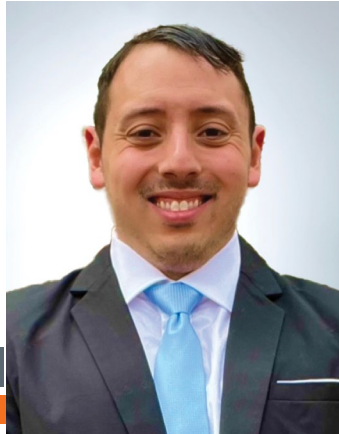
Program Management  
 Infrastructure Master Planning & Design  
 Project Proforma & Finance Evaluations  
 Site Design & Technical Evaluation  
 Hydrology & Hydraulic Analysis  
 Utility Infrastructure Design  
 Construction Administration/ Management  
 Stormwater Management Permitting & Regulatory Applications

### Education

**B.S.** – Civil Engineering,  
 Colorado State University

### Professional Registrations/ Affiliations

Colorado Professional Engineer,  
 License No. 36307  
 American Society of Civil Engineers  
 (ASCE)  
 Urban Land Institute (ULI)  
 Society of American Military Engineers  
 (SAME)  
 Colorado Springs Home Builders  
 Association – Board of Directors



## Christian Caron, PhD

**Project Manager; Demographic, Marketing, & Housing Analysis Task Lead**

### Areas of Expertise

- Housing Analysis
- Demographic & Marketing Analysis
- Data Analytics
- Policy Analysis
- Statistical Modeling
- Economic & Fiscal Impact Assessment
- Focus Group Facilitation
- Survey Research

### Education

- Ph.D.** – Political Science, University of North Carolina at Chapel Hill
- M.A.** – Political Science, University of North Carolina at Chapel Hill
- B.A.** – Political Science, University of Connecticut

### Professional Registrations/ Affiliations

- Regional Economic Models, Inc. (REMI) Annual Users' Conference
- National Association for Business Economics

Christian has an extensive educational background, having earned a PhD in Political Science from UNC Chapel Hill in 2022. During his time there, he specialized in state and local government and public policy. He has six years of academic research experience, in which he published multiple articles in highly selective peer-reviewed social science journals, presented at national conferences, appraised scholarly articles, and served as a research consultant for local government officials. As part of his doctoral studies, Christian underwent rigorous methodological training. He is well-versed in data analytics, statistics and modeling techniques, and qualitative methods.

A former college lecturer, Christian enjoys distilling highly technical information, often derived from advanced quantitative analysis, for mainstream audiences and stakeholders. Recently, Christian completed a housing inventory and affordability analysis on behalf of the City of Tempe, Arizona. Relying primarily on demographic and housing data from the U.S. Census Bureau's American Community Survey, he conducted gap analyses that estimated the difference between supply and demand at various income tiers.

### Relevant Experience

#### Housing Affordability and Availability Study | *Florida*

Christian served as the Research Lead on a project evaluating housing policy in Florida's defense communities. The purpose of the statewide study was to recommend reforms to improve affordability and availability. The research process entailed conducting an analysis of local Florida housing markets, with the goal of identifying the regions where the crisis was most acute; coordinating with local officials to obtain information about the current state of policy; and investigating best practices.

#### Housing Affordability and Inventory Analysis | *Tempe, Arizona*

As the Analysis Lead for this effort, Christian leveraged data from multiple sources—principally the U.S. Census Bureau's American Community Survey—for the primary purpose of assessing the state of Tempe's housing market. In addition to compiling a comprehensive demographic profile of the City, Christian completed an inventory and affordability analysis. At the core of the assessment were gap analyses that, first, sorted households and units into "affordability tiers" and, second, quantified the difference between supply and demand at each tier. This approach, developed by Florida International University's Metropolitan Center, allows for standardized comparisons from year to year. The deliverable also included intracity and intercity comparative analyses, which offered additional context for the findings.



## Larry Dotson

### QA/QC; Public Outreach & Stakeholder Engagement

Larry provides expert quality assurance and quality control leveraging broad technical and policy experience for a wide range of functionalities at the federal, state, regional, and local government levels. His expertise in a myriad of functionalities, strategy and policy development, budget programming and execution, grants management, contract management, regional and urban planning. He has been the project manager, lead planner, or principal author for numerous regional, community, and urban plans and studies with several additional major planning policy efforts. Larry is bilingual and provides masters-level reviews of Spanish language documents.

#### Areas of Expertise

QA/QC

Public Outreach & Stakeholder Engagement (bilingual)

Housing Policy

Urban Planning

Project Coordination

Regional Planning

GIS & Spatial Analysis

Graphics & Document Design

#### Education

**M.S.** – Regional and Urban Planning, University of Texas San Antonio

**M.A.** – Latin American Studies, University of New Mexico Albuquerque

**B.A.** – History and Political Science, University of Missouri Rolla

#### Professional Registrations/ Affiliations

American Planning Association

Urban Land Institute

The Nature Conservancy

Association of Defense Communities

The Association of the United States Army

Society of American Military Engineers

#### Relevant Experience

##### San Antonio Neighborhoods for Everyone | Texas

Larry was the Principal Planner and leading advocate for San Antonio Neighborhoods for Everyone – a policy advocacy group dedicated to achieving policy change to increase affordable workforce housing choices, fill the missing middle housing gap, and promote more walkable neighborhoods in downtown San Antonio. This advocacy group engaged the public, neighborhood associations, developers, urban planners, city council, and thought leaders to promote density bonuses, by-right accessory dwelling units, and zoning code changes to increase housing stock within the Loop 410 central metropolitan area.

##### Monterey Regional Compatible Use Study | California

As the Program Manager, Larry led this regional planning effort and public engagement with the City of Monterey to assess issues of compatibility and resiliency for communities around three Army bases, and one Navy installation in Monterey County. A major focus area of this study was housing availability and affordability specifically workforce housing and significant public engagement as reported by the Monterey Herald. Other notable issues included improved agency communication and collaboration, regional water quality and quantity, roadway capacity, as well as public safety, and resiliency related to wildland fires. Larry led engagement with project stakeholders, including county supervisors, city managers and mayors, water district directors, fire and police chiefs, and the public. This project recommended 137 strategies to the various installations, agencies, districts, and city and county governments to address the findings identified by the study.

##### West Traverse Mountain Compatible Area Study | Utah

As the Project Manager, Larry led this planning study to assess 25 compatibility factors and determined 29 findings. The study also assessed existing land use, regional growth patterns, and zoning for the six municipalities and two counties around Camp Williams. Principal issues centered around improving communication and coordination, housing growth and development, future land use, community resiliency, public safety, roadway capacity and transportation, water quality and quantity, noise, air quality, and integration of public parks, trails, and open spaces.



## Robert Mansolillo, GISP

### Regulation & Zoning Task Lead

Robert is a professional planner with 17 years of planning and GIS experience in urban and rural communities and the private sector. He has worked on a wide range of planning projects that include land development, zoning entitlements, zoning code updates, and design regulations. His skills include public outreach, conducting workshops, and presenting to governing bodies. In his role as a Housing Planner for the State of Oregon, he worked on a team to draft a model zoning code and statewide development regulation to allow more housing options in cities. In the development of the statewide housing rules, he fostered relationships with the public, community leaders, and elected officials. Robert's background includes review of zoning, site plan/landscaping plan, rezones, design review, and other development review requests.

#### Areas of Expertise

Planning & Zoning/Site Plan Review  
Zoning/Design/Form-Based & Land Development Ordinances  
Public & Stakeholder Engagement  
Comprehensive/General Planning  
Master Planning/Site Planning  
GIS Data Creation & Analysis

#### Education

**B.S.** – Geography,  
Arizona State University, 2001

#### Professional Registrations/ Affiliations

Geographic Information Systems  
Professional (GISP), No. 90855  
American Planning Association (APA)

#### Relevant Experience

##### City Planner | Rifle, Colorado

Robert worked for the planning division managing development applications as well as various aspects of research for open applications. He was responsible for the review of zoning, variance, site plan, and use requests. Customer service and public interface were key components of this position. Robert would assist applicants in the entitlement process by coordinating with internal reviewing departments, scheduling public meetings, and presenting cases to the Planning and Zoning Board.

##### Housing Planner | Oregon

Robert served as a Housing Planner for the State of Oregon Department of Land Conservation and Development. The focus of this position was to create a new statewide code and administrative rule language that promoted the development of various housing types. This was a collaborative effort consisting of consultants, state agencies, local governments, housing advocates, and significant outreach to the public. Robert's role was to coordinate with consultants and stakeholder groups, conduct advisory group meetings, and present updates to the Land Conservation and Development Commission.

##### Urban Planner | Oregon

Robert served as an Urban Planner for the State of Oregon Department of Land Conservation and Development. Focusing on GIS and technological advancements, Robert was the project manager for the Statewide Zoning, Comprehensive Plan and Urban Growth Boundary GIS datasets. This included managing updates and publication to several outlets including GIS servers, databases, and ArcGIS Online Applications.



## Zakary Payne, PE

### Opportunities Analysis Task Lead

As a Vice President and co-Director of Government Consulting Services for Matrix Design Group, Zakary is responsible for leading a team of 14 professionals focused on successfully executing project requirements for local, state, and federal government partners. Zakary specializes in providing consulting support that includes asset management, process improvement, facilitation, and strategic planning. Zakary also has 15 years of United States Air Force experience after graduating from the Air Force Academy including overseeing military family housing programs at multiple military installations. Zakary is a results-oriented leader known for his creativity and innovation.

#### Areas of Expertise

Opportunities Analysis  
Process Improvement  
Program Management  
Asset Management  
Strategic Planning  
Installation Management  
Public/Private Partnerships  
Intergovernmental Service Agreements  
Client Relationship Management

#### Education

**M.B.A.** – University of Texas at San Antonio

**B.S.** – Civil Engineering,  
United States Air Force Academy

#### Professional Registrations/ Affiliations

Colorado Professional Engineer,  
License No. 56171

Texas Professional Engineer,  
License No. 102315

Florida Professional Engineer,  
License No. 89927

Society of American Military Engineers  
(SAME)

Association of Defense Communities  
(ADC)

United States Air Force Academy  
Young Alumni Ambassador

#### Relevant Experience

##### **Military Family Housing Operations | San Antonio, Texas**

Zakary served as the Public Works Director for Joint Base San Antonio-Randolph. In this role, he led a 300-person organization responsible for providing all facility and infrastructure support for a \$1.7 billion portfolio. Zakary was responsible for all military family housing operations on the installation that included maintenance, repair, and management of hundreds of units, all of which are included in the National Register of Historic Places. In this capacity, Zakary oversaw capital investment, reviewed and approved on-base housing applications, and he collaborated with the privatized housing developer, Pinnacle-Hunt, with developing strategies to attract and retain tenants in on-base housing units.

##### **Tempe Housing Inventory & Affordability Analysis | Tempe, Arizona**

Zakary served as the Project Manager for the Tempe Housing Inventory & Affordability Analysis. As part of this project, his team analyzed data from the Census Bureau's 2020 American Community Survey (ACS) related to housing inventory and affordability for various ranges of Median Family Income (MFI). He assessed trends in both availability and affordability across various zip codes within the city as well as across the region, and in comparison, to similar college towns including Boulder, Colorado; Durham, North Carolina; and Provo, Utah. The analysis looked at both owner-occupied and renter-occupied homes and the results were summarized in a written report and a two-page strategic communication product. The analysis confirmed that the availability of both owner-occupied and renter-occupied housing for low-income earning families was very limited, which is a major issue for Tempe given the large student population there.



## Chris Martin, GISP

### GIS/Data Analysis Task Lead

Chris has 20 years of professional experience in the GIS field and has been with Matrix 16 years. As a certified GIS Professional, he has provided support in both the public and private sectors on diverse projects including demographic and housing analysis, transportation modeling, housing suitability siting, asset management, financial analysis, and capital planning. Chris has extensive experience leveraging GIS for various community projects and is adept at developing GIS-based digital products to facilitate stakeholder and public outreach efforts.

### Relevant Experience

#### Areas of Expertise

Housing Analysis & Growth Needs  
GIS Tools for Facilitation & Outreach  
Demographic Analysis  
GIS Modeling  
Community Planning  
Suitability Analysis  
Data-Driven Prioritization

#### Education

**M.S.** – Geographic Information Science, University of Denver, 2006  
**B.A.** – Geography, University of Denver, 2003  
**B.S.** – Environmental Science, University of Denver, 2003

#### Professional Registrations/ Affiliations

Geographic Information Systems Professional (GISP), No. 91306

#### Technical Skills

GIS Software: Esri ArcGIS Suite  
CAD Software: AutoCAD  
GPS Units: Trimble's Line of Products  
Programming: VB.NET, VBScript, Python, VBA, HTML, JavaScript, and SQL  
Databases: SQL Server, Oracle, MySQL, and Microsoft Access  
Reporting Software: Crystal Reports

#### Tempe, Scottsdale, and Surprise and Peoria Housing Inventory & Affordability Analyses | *Arizona*

Chris served as the GIS Lead for these three separate projects with similar scopes. Using the latest demographic and housing information, Matrix performed spatial analyses and completed a series of maps that depicted current and future housing needs within these cities. We worked closely with the GIS and planning departments to obtain authoritative data that was in turn analyzed and processed to produce metrics tied to geographic location that fed into the overall analyses.

#### Colorado Springs Multifamily Housing Suitability Analysis | *Colorado*

Chris was the Project Manager for this suitability analysis completed in Colorado Springs. The project analyzed all parcels by scoring them based on their overall opportunity for new multifamily housing construction. A scorecard was developed that looked at 11 criteria including zoning, parcel size, proximity to existing utilities, and CoStar-derived metrics such as average rent and household growth. All parcels were scored on a relative scale and the results were added to a web-based application where the information could be studied in detail as well as searched and queried.

#### Colorado Springs Utilities Geospatial Growth Model | *Colorado*

The City of Colorado Springs is experiencing unprecedented growth leading to an increased focus on annexation of surrounding lands. Colorado Springs Utilities is responsible for providing water, gas, electric, and wastewater services to Colorado Springs customers. Chris served as the Matrix GIS Lead to develop a citywide model that could allocate anticipated growth to designated annexation parcels in a predictable and rule-based fashion. Different modeling years were simulated to determine future utility demand requirements. The model facilitates the decision-making process as Colorado Springs evaluates future land for annexation.

#### Teller County Water & Sanitation District #1 | *Colorado*

Chris developed a GIS database to facilitate the day-to-day and long-term maintenance of the District's water distribution system. Esri's Local Government Information Model provided the base database framework with customizations added to tailor the solution. The database contained information on water mains, fire hydrants, water wells, water meters, valves, fittings, and a water tank.





## Nicole Schanel, PE

### Land Development Task Lead

Nicole is a dynamic, critical-thinking engineer with over 10 years of progressive civil engineering experience with private and public-sector clients. As land development task lead, she brings solid proven experience in a holistic approach to community planning and development. Recognizing the needs of various stakeholders in the process, Nicole's diverse design background lends to creative win-win solutions regarding design for site grading, roadway, drainage, and utilities.

### Relevant Experience

#### Areas of Expertise

Land Development  
Jurisdictional Permitting & Process  
Entitlements  
Project Management  
Community Planning  
Utility Infrastructure Design  
Stormwater Engineering  
Roadway Transportation Design  
Master Drainage Analysis & Modeling

#### Education

**M.B.A.** – University of Colorado,  
Colorado Springs, 2022

**B.S.** – Civil Engineering,  
Colorado School of Mines, 2011

#### Professional Registrations/ Affiliations

Colorado Professional Engineer,  
License No. 0052434, 2017

#### Technical Skills

AutoCAD Civil 3D  
StormCAD  
UD Sewer  
HEC-RAS  
SWMM

#### **Cordera and Briargate Crossing Developments & Union Boulevard Extension | Colorado Springs, Colorado**

As the Project Manager, Nicole was instrumental in creating a cohesive design between filings including horizontal and vertical design of roadways for 1,000 acres of land for the Cordera and Briargate Crossing developments located in northeastern Colorado Springs. The area is part of the 9,600-acre Briargate Master Planned Community. Work has included extensive infrastructure master planning for the site as well as detailed cost modeling and design. Specific projects include multiple single-family filings, the extension of Union Boulevard (principle arterial) with a pedestrian underpass, multiple high-level drainage reports and associated storm drain, water quality, and detention design.

#### **Corvallis Land Development Plan | Fountain, Colorado**

As the Senior Design Engineer, Nicole analyzed existing infrastructure combined with future uses to design the utility systems for a 275-acre development located within the City of Fountain, Colorado that includes commercial, multi-family, and single-family residential uses. Considerable coordination was required with the Fountain Mutual Irrigation Company to reroute the existing ditch that runs through the property.

#### **The Creek at Cottonwood Apartment Homes | Colorado Springs, Colorado**

The Creek at Cottonwood Apartments is an 11-acre multi-family development consisting of approximately 260 units in Colorado Springs. As a Housing and Urban Development (HUD)-funded project, Nicole was able to work proactively with the developer to ensure any additional requirements were met. Nicole coordinated design between the various stakeholders as well as the municipal jurisdictions through approvals.

#### **Trails at Aspen Ridge | El Paso County, Colorado**

Nicole served as Project Manager and Lead Engineer for a 118-acre master planned community located in southeastern Colorado Springs. The project included a variety of housing types and sizes, common open space corridors, monumentation entry signage, streetscape planting design, and a 6-acre community park. She led and coordinated the design team through conceptual design to the construction document submittals for review and approval by the El Paso County Planning and Community Department.



## Justin McBryde

### Demographic, Marketing, & Housing Analysis

Justin's primary background is in data analytics and research. His experience also includes project management and urban planning support. Justin is a former consultant for the Department of Homeland Security and Pension Benefit Guarantee Corporation which lends to his extensive experience working with large government ERP systems, supply chains, and GIS applications.

#### Relevant Experience

##### Data Analytics

Justin is currently assisting with the Fort Smith Air National Guard reorganization bed down. Justin managed a team of six to successfully complete client deliverables and large databases. He was a data analyst for the Pension Benefit Guarantee Corporation where he created databases with participant numbers ranging from 1,000 to 5,000. He drafted and finalized deliverables for actuarial review on a continuous project schedule. Additionally, working in tandem with the Department of Homeland Security, Justin assisted with the location servicing of foreign peoples.

##### Planning

Justin was a Senior Planning Aid for Fairfax County in Virginia where he worked on transportation planning for a 400-square-mile area in one of the fastest-growing counties in the United States. He performed transportation analysis, including traffic demand management, trip generation, distribution, assignment, and capacity calculations. Justin collaborated in the development of Tysons Corner with the negotiations of preferred conditions. He helped decrease customer wait time by an average of two days for the zoning permit approval process. He applied principles of finance to analyze budgets. Justin monitored and reported performance against plans to ensure that contractual, cost and schedule objectives were met. Justin assisted with drafting setback certifications and has provided assistance in zoning-related issues.

#### Areas of Expertise

Data Analytics & Research  
Project Management  
Planning  
Public Policy

#### Education

**B.S.** – Urban and Regional Planning,  
Texas A&M University, College of  
Architecture

**Corps of Cadets** –  
Senior Military College

#### Professional Registrations/ Affiliations

Coupa Certified in Supply Chain  
Logistics



## Heather Garbarino

### Regulation & Zoning

Heather brings over a decade of community and compatibility planning experience, with a strong background in housing analysis, zoning, and community outreach. In her former role as a senior planner for the State of Arizona, she assisted in the development of the statewide land use compatibility plan and represented the governor in fostering relationships with community leaders and elected officials, but her primary role was to provide Growing Smarter legislation technical compliance support to every municipality and tribe in the state. Heather is also a co-founder and active board member of Nourish Every Child, a non-profit that has provided nutrition and education to children in poverty in rural Haiti for nearly 12 years.

#### Areas of Expertise

Regulation & Zoning  
Environmental Impact Statements & Assessments  
Comprehensive/General Planning  
Community Planning/Area Planning  
Public & Stakeholder Engagement  
Public Meeting Facilitation  
Compatibility Planning

#### Education

**Extended B.S.** – Environmental Planning, emphasis in Human and Built Environments and Impacts, Northern Arizona University, 2000

#### Professional Registrations/ Affiliations

American Planning Association (APA)

#### Relevant Experience

##### Senior Planner | *Arizona*

Heather served as the Senior Planner serving every municipality in Arizona as a representative of the Governor. Primary coordinator of Arizona Joint Land Use Studies encompassing every installation in the state. Leading consensus-building efforts between installation command and surrounding communities. Emphasis on Growing Smarter Legislation compliance, municipal elected training seminars, and constituent services.

##### Planner | *Maricopa County Planning & Development*

Heather worked for the current planning division managing special use and conditional use permits as well as various aspects of research for open applications. Customer service and public interface were given top priority.

##### City of Page General Plan | *Page, Arizona*

Heather served as primary planning support in the general plan development efforts for the City of Page. Heather participated in every aspect of the process with special attention to the unique concerns of Page's lack of housing. Public engagement efforts focused on drawing out input from the community and develop a range of opportunities to mitigate the issue.



# Rachel Granrath, AICP

## Public Outreach & Stakeholder Engagement Task Lead

Rachel is a strong believer in placemaking and assisting clients to realize their potential and vision through the public planning process. She specializes in facilitating and managing complex groups and interests to achieve a comprehensive planning effort. Her skills include development and plan review, downtown planning, economic development, community engagement, long-range planning, redevelopment and infill, grant writing, and floodplain management. Drawing from her experience in rural and urban communities, she excels in developing strategies, visual tools, urban design, and guiding a community from start to finish through an inclusive planning process. She takes great pride in her work and always strives to meet the needs and goals of the community.

### Areas of Expertise

- Public & Stakeholder Engagement
- Group Facilitation
- Grant Writing
- Economic Development
- Community Planning

### Education

- M.A.** – Urban and Regional Planning, Roger Williams University
- B.A.** – Architecture, Eastern Washington University

### Professional Registrations/Affiliations

American Institute of Certified Planners (AICP), No. 33291

### Relevant Experience

- Elizabeth Downtown Revitalization Plan – Elizabeth, CO
- East Central Council of Local Governments (ECCOG) Comprehensive Economic Development Strategy – Limon, CO
- Elizabeth Re-Branding – Elizabeth, CO
- Cherry Hills Village Subdivision, Zoning, Stormwater, and Building Code Amendments – Cherry Hills Village, CO
- John Meade Park Civic Center and Park, Amphitheatre, and Playground – Cherry Hills Village, CO
- Quincy Farm Master Plan, Preservation and Open Space – Cherry Hills Village, CO
- Aurora, Art in Public Places Master Plan – Aurora, CO
- Housing Action Plan – Friday Harbor, WA
- Swinomish Indian Tribal Community Housing Action Plan – La Conner, WA
- Butte Silver Bow Housing Plan – Butte Silver Bow, MT
- Growth Policy Update – Helena, MT
- Housing Action Plan – Pullman, WA
- Bridgeport Community Revitalization Plan – Bridgeport, WA
- Quincy On-Call Planning – Quincy, WA
- Unified Development Code and Zoning Map Update – Moses Lake, WA
- Malden Comprehensive Plan and Zoning Code – Malden, WA
- Chewelah Downtown Subarea Plan - Chewelah WA
- Airway Heights Downtown Subarea Plan & Commercial Code Amendments – Airway Heights, WA
- Metaline Zoning Code - Metaline, WA
- Comprehensive Plan, Development Regulations, and Critical Areas Ordinance Update – Newport, WA



# Rikki Martinez, EIT

## Spanish Translation

As a Spanish speaker, Rikki has focused her career on ensuring that there are no barriers to communicating important information to the community. She is passionate about building community and is a skilled mediator and facilitator. Rikki has demonstrated foreign language expertise, excellent writing skills, creativity, attention to detail, and sensitivity to cultural differences in converting information from one language to another.

### Relevant Experience

- Downtown Revitalization Plan (Translation Support) – Bridgeport, WA
- Tacoma Avenue Improvements (Translation Support) – Wenatchee, WA
- Snowcrest Pedestrian Bridge – Crested Butte, CO
- Willy's Cabin – Winter Park, CO
- Quincy Downtown Revitalization Plan – Quincy, WA
- Parks, Recreation, Open Space, and Trails (PROST) Plan – Quincy, WA
- Chelan Downtown Streetscape Improvements – Chelan, WA
- Multimodal Trails Master Plan – Chelan County, WA
- Tumwater Valley Drive Realignment – Tumwater, WA

### Areas of Expertise

- Spanish Translation
- Public & Stakeholder Engagement
- Group Facilitation

### Education

**B.S.** – Civil Engineering,  
Saint Martin's University

### Professional Registrations/ Affiliations

Engineer in Training (EIT)



**Matrix**



# Matrix

Anniston, AL  
Atlanta, GA  
Colorado Springs, CO  
Denver, CO

Niceville, FL  
Parsons, KS  
Phoenix, AZ  
San Antonio, TX

Tamuning, GU  
Texarkana, TX  
Washington, DC



**Paonia Housing Needs Assessment &  
Housing Action Plan**  
**COST PROPOSAL**



PREPARED FOR  
**Town of Paonia**

February 8, 2023



## Cost Proposal

Matrix will perform this housing needs assessment on time and within the firm fixed price budget, which includes all direct and indirect costs. Matrix is committed to the assurance of high-quality deliverables and to meeting or exceeding our client's expectations. To ensure quality deliverables and client satisfaction on this project, the management team and task leads provide clear guidance on expectations to all staff working on the project prior to starting on a task. During development of the assessment, our management team performs routine reviews of progress to ensure that products are on target and will be completed per the agreed upon schedule. Any anomalies in the project progress are quickly identified and rectified. The management team maintains routine communications with the client on progress.

### Hourly Rates


Key Personnel	Classification	Hourly Rate
Gregory Shaner, PE	Vice President	\$235.00
Zakary Payne, PE	Vice President	\$235.00
	Associate Vice President	\$225.00
Chris Martin, GISP	Executive Associate	\$205.00
Larry Dotson	Senior Associate	\$195.00
Nicole Schanel, PE	Senior Associate	\$195.00
	Associate	\$170.00
	Professional VII	\$150.00
Christian Caron, PhD	Professional VI	\$140.00
Robert Mansolillo, GISP	Professional V	\$125.00
	Professional IV	\$120.00
	Professional III	\$115.00
	Professional II	\$110.00
	Professional I	\$100.00
	Staff VII	\$150.00
	Staff VI	\$140.00
	Staff V	\$120.00
	Staff IV	\$100.00
	Staff III	\$85.00
	Staff II	\$75.00
	Staff I	\$65.00

### Fee Breakdown

Task	Total Fee	Personnel Time	Overhead Expense	Profit
Project Initiation & Administration	\$3,000	\$2,700	\$0	\$300
Data Collection & Analysis	\$10,000	\$9,000	\$0	\$1,000
Action Plan Research	\$12,000	\$10,800	\$0	\$1,200
Community Outreach	\$15,000	\$9,000	\$4,500	\$1,500
Housing Needs Assessment Report Development	\$23,000	\$18,700	\$2,000	\$2,300
Action Plan Development	\$16,000	\$14,400	\$0	\$1,600
<b>TOTAL</b>	<b>\$79,000</b>			



Economic Planning Systems

	Economic Planning Systems



# HOUSING NEEDS ASSESSMENT & HOUSING ACTION PLAN

Prepared for:



Town of Paonia, Colorado

Prepared by:



Economic & Planning  
Systems, Inc.

in collaboration with:





February 8 2023

Ms. Leslie Klusmire  
Interim Town Administrator  
Town of Paonia  
POB 460  
214 Grand Avenue  
Paonia, CO 81428

**Subject: Housing Needs Assessment & Housing Action Plan; EPS #233012**

Dear Leslie:

Economic & Planning Systems (EPS), with our partner SE Group, is pleased to present this proposal for a Housing Needs Assessment and Housing Action Plan. EPS and SE Group have extensive experience working together with small and larger communities across the State on housing strategies and community plans. We are highly familiar with navigating community needs and informing local policy approaches to address these needs. In housing, we focus on projects like yours that focus on action and implementation.

EPS and SE Group are drawn to this project because of our enthusiasm for working with small and midsize communities on housing needs and strategies, and economic and community development. We have worked with communities around the region on housing issues, including Fruita, Delta, Lake County and Leadville, Pagosa Springs and Archuleta County, Chaffee County, Summit County, Glenwood Springs, Basalt, Eagle, Ouray, and others. We understand the changes these places are experiencing pre- and post-pandemic to their economies, demographics, and housing markets. We are passionate about helping communities address them with creative and actionable solutions to create and preserve housing access for all residents.

EPS will be the lead consultant for this project and will direct efforts to assess housing needs and develop strategies, policies, and programs in the strategic action plan. EPS and SE Group will both facilitate the community engagement and outreach efforts. SE Group will be responsible for creating development concepts and completing the code analysis portion of the strategic action plan.

EPS professional staff assigned to the project are Brian Duffany, Principal, who will be the Project Director and Principal-in-Charge and Carson Bryant, Associate, who will be the project manager and lead analyst, supported by additional EPS staff for specific tasks. SE Group professional staff includes Gabby Voeller, AICP, Senior Community Planner, Julia Randall, Analyst/Planner, and Avery Wolfe, Planner.

730 17<sup>th</sup> Street  
Suite 630  
Denver, CO 80202  
303 623 3557

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Oakland  
Sacramento

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The work plan described in our proposal contains three main elements. The Needs Assessment is the “data” on the housing market, economy, and demographics affecting housing demand. The Needs Assessment will be informed by a robust community outreach process that will provide qualitative information, stories, and experiences that will be important to incorporate to enrich our and the community’s understanding of the challenges. Next, we will evaluate potential sites for housing development and partnerships. Lastly, we will provide the Town with an Action Plan that provides realistic locally relevant steps to take to improve housing access and opportunity.

EPS takes a collaborative approach to everything we do and look forward to your input as we refine a scope and move forward. We are excited about the opportunity to work with you and the Paonia community.

PROJECT DIRECTOR/PRINCIPAL CONTACT:

Brian Duffany, Principal  
Economic & Planning Systems  
730 17th Street, Suite 630  
Denver, CO 80202  
303 623 3557 (o) | 720 460 3302 (d) [bduffany@epsdenver.com](mailto:bduffany@epsdenver.com)

Sincerely,

ECONOMIC & PLANNING SYSTEMS, INC.



Brian Duffany  
Principal

# Proposal

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## **Project Understanding**

Paonia is a community that reflects the diverse and evolving nature of small towns in Colorado. Paonia was first inhabited by the Ute people who lived throughout Colorado, Utah, and the Great Basin. White settlers brought farming and ranching, orchards, and coal mining to the area in the 1800s. The West Elk Coal Mine up Hwy. 133 outside Somerset is still active and served by Union Pacific unit coal trains. Today, Paonia is well known for its high-quality fruits and wine that are exported throughout Colorado. More recently, the community has evolved into a hub for local food, brewing and viniculture, artists, and outdoor recreation. Like similar high-amenity communities throughout the Rockies, it is also attracting remote workers (working for a company outside the region) and people who can bring their job or business anywhere. The confluence of these different resident (and visitor) types is affecting the housing market, as remote workers can typically pay more for housing than people working in the local economy. With so much growth in Colorado, many relatively undiscovered places are now seeing these same types of growth and housing pressures.

EPS and SE Group have deep experience working together in places in Colorado with similar challenges and evolution to Paonia. EPS specializes in helping communities understand change, and in the housing context, what local tools and strategies can be used to create and preserve housing for local residents and the workforce – to enable people to continue to live in their community, and to help sustain the local economy and character of the place. SE Group also has extensive experience in small community planning, outreach, and site-specific physical planning. Through objective research and analysis on the economy and housing market, and extensive outreach in the community, we will help the community and its leaders determine what the most pressing housing issues are, and how the community can act and partner to improve housing access and preservation for the local community.

Our goal for this project is to document housing needs in Paonia while also developing relevant policy opportunities for the Town to best address these needs. We see the primary focus of this project as building a common understanding of community housing needs and providing actionable strategies for developing, preserving, and funding housing.

# Scope of Work

## Task 1: Housing Needs Assessment

The EPS Team will prepare a comprehensive housing needs assessment that documents demographic, economic, and housing market conditions in Paonia that influence housing demand. We will assess the current housing stock, price trends, and recent development activity in the area. The analysis will highlight housing affordability gaps for the local workforce as well as evaluate the housing needs of particular populations, including seniors and seasonal workers. Based on the analysis, EPS will provide an estimate of total housing need, broken down by income level and tenure.

Given the relatively small size of Paonia, it is important for the needs assessment to draw from numerous data sources. In addition to the secondary data on demographic, economic, and housing conditions available from the U.S. Census and the Colorado State Demography Office, EPS will proactively gather data from primary sources where available, such as from Town staff, realtors, residents, developers, and housing practitioners. The needs assessment will be informed by data and enriched and expanded on by our community outreach efforts. All of the data points listed in the RFP are relevant to the housing needs assessment. EPS has significant experience working with these data points and using them to inform housing studies and action plans.

## Task 2: Community Outreach

A community outreach effort is central to this project. The outreach will inform the understanding of the Town’s housing needs and the most relevant and effective strategies to address these needs. The team will ensure that outreach efforts are comprehensive and engage a wide range of Paonia’s population, especially marginalized groups and groups who face the greatest level of housing instability.

### **Task 2.1 - Focus Groups**

The first part of the community outreach effort will be stakeholder-specific outreach, which will involve dedicated focus group sessions with various groups to better understand housing needs, barriers to access, and housing market conditions. The team will host 2-hour meetings with each group in which we will facilitate a discussion about key housing issues and needs in Paonia. This format will enable the team to engage in a robust conversation with stakeholders and to gather their input. While the list of groups is will be determined over the course of the project, the groups we intend to hold these focus group sessions with include:

- Senior citizens
- Farm workers
- Immigrant populations
- Service workers
- Major employers
- Property owners
- Residential builders/developers
- Other important community groups

The team will make a concerted effort to connect with these groups and ensure their participation in our outreach efforts. In order to accomplish this, the team will partner with service providers, nonprofits, churches, unions, and other community organizations in the area to organize outreach and set up the dedicated focus group sessions. Where needed, we will incorporate Spanish translation into these meetings. We plan on making a 2-day trip to conduct this outreach and complete as many interviews as possible. We will hold virtual meetings for those we cannot arrange in person.

***Task 2.2 - Community Open House***

The next component of the community outreach effort will be a public open house. The team will host an in-person open house lasting 2-3 hours in which we present preliminary findings on housing needs and strategies to the public and gather feedback. This will enable community members to directly engage with the project team and will expand the scope of input we gather for the project. To promote turnout and accessibility to the open house, we will work with Town staff to promote the event across a wide spectrum of the town’s population and will offer two different event times (one in the afternoon, one in the evening). In addition, the team will provide Spanish translation at the open house.

***Task 2.2 - Policymaker Work Session***

The last component of the community outreach effort will be an in-person work session with a policymaking body, such as Town Board of Trustees and/or the Planning Commission. In the work session, the team will present its project findings and will provide policymakers with an opportunity to comment and offer feedback to the project. The team, along with Town staff, will incorporate feedback from the work session into the final product. In this meeting, the team will offer live Spanish interpretation for an additional fee.

**Task 3: Site Identification and Development Concepts**

In this task, the team will identify and evaluate potential sites for housing development in Paonia. The team will propose 3-4 sites for housing development and will provide basic massing; images to describe housing types; unit type recommendations; affordability recommendations; information on development costs; financial feasibility; and key barriers to development for each site. The team will recommend potential policy tools that can be applied to help with feasibility. Information on development constraints and costs will be gathered from housing market research and from interviews with local builders and developers.



Selecting sites for housing development will be based on conversations with Town staff, policy goals, interviews with property owners, and criteria related to available infrastructure, site location, lot size, whether the site is contiguous with Town, and current zoning. The development concepts will serve as concrete examples of where and how housing can be developed in Paonia.

#### Task 4: Strategic Action Plan

This task will provide a concrete set of actions that the Town can take to address housing needs. The action plan will be organized into four different sets of strategies: housing production, preservation, funding, and land use code. The strategies recommended will consider local market and community context while also considering the practicality of what the Town can implement.

- **Housing Production:** These strategies will be aimed at developing new affordable and attainable housing units and increasing the housing supply to meet local housing needs. The strategies will take into account local development constraints and consider how approaches can meet needs at various levels of affordability.
- **Housing Preservation and Stewardship:** These strategies will focus on the preservation of existing housing units, especially those that are relatively affordable. Preserving housing units is a way to ensure housing stability for current residents while committing fewer resources than new construction. These strategies will also focus on the role of deed restrictions in preserving housing affordability over the long-term.
- **Funding:** This part of the plan will give an overview of local options for the Town to establish dedicated funding sources for housing. The team will provide a comprehensive overview of relevant taxes and fees as well as estimates of revenue potential and possible barriers to implementation. In addition, the team will describe State funding sources that are currently available for housing.
- **Code Revisions:** This part of the plan will provide recommendations of land use code changes that will enable and incentivize the development of more housing types, such as ADUs, duplexes, and fourplexes. This will include an analysis of how the existing code regulates housing development through rules related to allowable density, parking requirements, minimum lot sizes, and setbacks. The team will also evaluate existing short-term rental regulations and offer recommendations on how the Town can advance affordable housing availability through regulations on short-term rentals.

The strategic action plan will recommend how the Town can meet at least four of the DOLA qualifying strategies in order to successfully apply for funding from the DOLA Incentives Grant Program. The team is deeply familiar with the grant program and will evaluate housing strategies through the lens of DOLA's qualifying strategies.

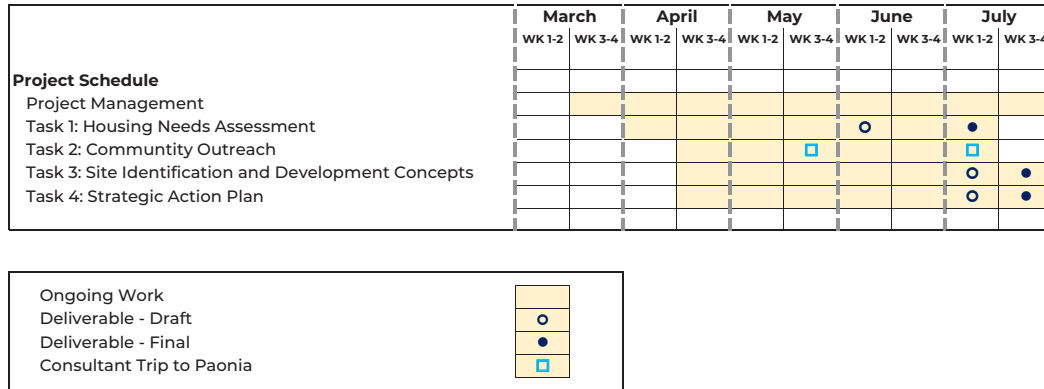
Lastly, the strategic action plan will provide the Town an overview of the steps involved in formally establishing a housing authority - defining the responsibilities of a housing authority, staffing a housing authority, and creating and funding housing programs within the housing authority.

The findings and recommendations will be integrated into a final report complete with a summary, graphics, and maps. The report is intended to be used by Town staff, elected officials, and the public.

# Proposed Project Schedule

EPS proposes to complete the scope of work within an approximately four-month period of the initial notice to proceed as shown in **Figure 1**.

**Figure 1. Project Schedule**



The consultant team anticipates making two in-person trips to Paonia to conduct its community outreach efforts. During the first trip, which we expect to take place in mid-May, the team will hold the focus group interviews and will host the community open house. During the second trip, which we expect to take place in mid-July, the team will hold the policymaker work session with the relevant groups to review the recommendations.

The Town will be asked to provide information on recent construction activity, land use/zoning policies, and related information. We will also ask for assistance in identifying stakeholders and meeting locations. We do not anticipate that the Town will need to contribute significant work or materials other than this.

## Workload

EPS uses a workload analysis internally that illustrates total project budgets, remaining budgets, and deliverable timelines to ensure that projects are delivered on-time, on-budget, and that adequate staffing resources are available well in advance of deadline overlaps. We have chosen the key staff based on the requirements of the project, availability, and the relevant experience of each staff person. EPS is confident that we can manage the scope of work for the Town of Paonia and attest to having the capacity to meet the project schedule completion date of July 31, 2023.



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## About Economic & Planning Systems

**Economic & Planning Systems, Inc. (EPS)** is a land economics consulting firm experienced in the full spectrum of services related to real estate development, the financing of public infrastructure and government services, land use and conservation planning, and government organization.

EPS was founded on the principle that real estate development and land use-related public policy should be built on realistic assessment of market forces and economic trends, feasible implementation measures, and recognition of public policy objectives, including provisions for required public facilities and services.

### AREAS OF EXPERTISE

- ▶ Real Estate Economics
- ▶ Public Finance
- ▶ Land Use & Transportation
- ▶ Economic Development & Revitalization
- ▶ Fiscal and Economic Impact Analysis
- ▶ Housing Policy
- ▶ Public-Private Partnership (P3)
- ▶ Parks and Open Space Economics

### Clients Served

Since 1983 EPS has provided consulting services to hundreds of public- and private-sector clients in Colorado and throughout the United States. Clients include cities, counties, special districts, multi-jurisdictional authorities, property owners, developers, financial institutions, and land use attorneys.

### Staff Capabilities

The professional staff includes specialists in public finance, real estate development, land use and transportation planning, government organization, and computer applications. The firm excels in preparing concise analyses that disclose risks and impacts, support decision making, and provide solutions to real estate development and land use-related problems.



# HOUSING POLICY

**EPS** has a depth of affordable housing related experience. Availability of housing that meets the need for the full spectrum of affordability should be viewed as an integral part of any successful region, conferring economic, social, and environmental benefits that underpin sustainable growth. In recent years, many communities have experienced significant increases in housing demand, pushing rents and prices beyond the level that median-income households can afford. Rising housing costs can cause overcrowding, financial hardship, and in some cases force households to leave their neighborhoods, jobs, and/or social networks. The lack of access to affordable housing affects all sectors of society and has become a particular problem for workers in lower paying fields (e.g., service, public, and nonprofit sectors).

EPS offers a full spectrum of services related to assessing specific population affordable housing needs, workforce housing, and market-rate housing. We work with communities to structure initial strategic housing plan frameworks, revise housing needs goals, establish production or rehabilitation targets, develop financing plans, or provide rigorous analysis that quantifies the return on investment from public dollars directed toward housing goals. Our work integrates an understanding of local, regional, and national market and policy forces. EPS works in a variety of contexts, from large urban metropolitan areas and regional planning organizations to smaller, rural, suburban, and resort markets.

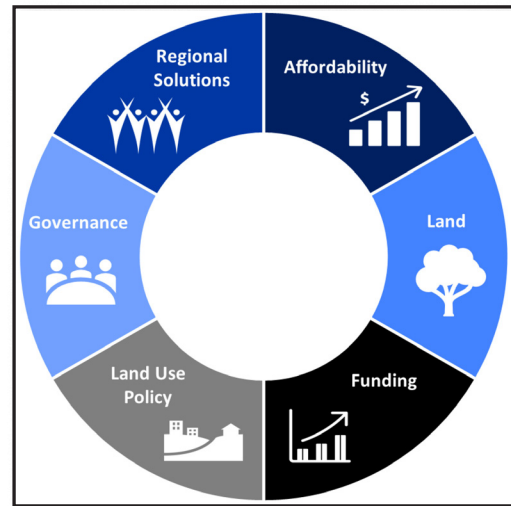


# Similar Projects by Key Personnel

## EPS Project Profiles

### Lake County Housing Needs Assessment Leadville, Colorado

Lake County is a unique community in the Rocky Mountain West, given its origins and continuity as a mining community and its growing appeal as a tourism and recreation destination. Leadville, the County’s only incorporated municipality, has a strong mining history and downtown historic district. The regional context for Lake County is one of growth in both the commercial and residential sectors. The surrounding counties include Eagle, Summit, Chaffee, and Pitkin, each of which has a thriving real estate market and growing economy. Lake County’s residents provide much of the workforce for these surrounding communities, as regional housing challenges push workers to seek housing in Lake County. There has been a major shift in the Lake County housing market since 2015, both in rental and for-sale homes. While Lake County is not alone in the challenges it is facing, its geographic and employment context make the challenges and opportunities present distinct in the region.



EPS prepared a Housing Needs Assessment for Lake County that focused on identifying the key housing issues facing the community as well as resources in the County available to address these issues. The analysis documented economic and demographic conditions contributing to housing affordability issues, evaluated the housing market to identify market trends affecting affordability, and recommended strategies and actions for the City and County to pursue to increase the supply and affordability of housing.

This work was done through data analysis, stakeholder input obtained through focus groups and direct interviews, and community outreach through two community meetings. The resources and strategies available to the community were cataloged, and applicability to Leadville and Lake County was assessed as part of the creation of an action plan to address identified issues and goals. The analysis emphasized implementation measures focused on policy, funding, and governance. EPS made recommendations in five categories: land strategy, policy initiatives, organization and management, funding sources, and regional partnerships.

**Fruita Housing Funding Strategy  
Fruita, Colorado**

The City of Fruita, located on the western slope, has emerged as a hub for outdoor recreation and is facing mounting housing market pressures. Like many other communities in Colorado, there have been growing concerns about the ability of the local workforce to access housing in the city. The City retained EPS to formulate a housing funding strategy focused on generating new revenue streams and how those funds can be most effectively allocated to create more workforce housing options. The study also modeled various housing programs, including an ADU program, land banking, and down payment assistance, to determine the impact of new funding in relation to housing targets and the financial feasibility of establishing a revolving loan fund for the City. Based on our recommendations, the City intends to establish permanent funding sources for housing and to consider a combination of supply- and demand-side programs aimed at workforce housing.

**Short Term Rental Regulatory Fee Study  
Breckenridge, Colorado**

The Town of Breckenridge is a national and international ski and outdoor recreation destination. Town policy makers are facing a housing crisis and pressure from constituents to address the problem. The housing challenges are being amplified by the ongoing COVID-19 pandemic and its impacts on “amenity migration” patterns resulting in increased purchases and occupancy of second homes and conversion of second homes and long term rentals to full time residences for remote workers, further pricing out the local workforce. On top of that, the growth of vacation rental by owner platforms such as VRBO and Airbnb is driving investment in housing by corporate entities buying “trophy” properties to manage and market with usage patterns more like hotels than traditional vacation rentals. The growth of Metro Denver has also generated more buyers who tend to purchase older and lower priced properties as second homes, sometimes converting long-term rental housing to second homes and short term rentals (STRs).



The Town hired EPS to work with its legal staff to design a regulatory fee program applied to short term rentals. Traditional lodging properties such as hotels and lodges (defined by zoning classifications) are exempt from the fee in order to target properties more likely to affect neighborhoods and long term rental or purchase opportunities for the local workforce. EPS prepared an economic analysis that demonstrated the impacts of STR use on the demand for workforce housing and calculated an annual fee designed to fund related

housing programs. We then projected the potential fee revenue the program would generate and worked with Town Housing and Finance staff to ensure the fee revenues would be restricted to housing programs. Town Council adopted the fee in November 2021.

**Housing Needs Assessment  
Summit County, Colorado**

EPS was hired by the Summit Combined Housing Authority and its partners (Summit County, and Towns of Breckenridge, Frisco, Silverthorne, and Dillon) to prepare the 2019 Housing Needs Assessment. The study was comprised of two components: an economic analysis to estimate the housing gaps and a resident and employee survey to document housing preferences and issues at a more individual level.

Summit County does much of its planning by Basin, and the gap analysis was designed to estimate housing gaps both countywide and in each Basin. Countywide, the gap between supply (available units) and demand (existing population and jobs) was estimated at 725 units, growing to 2,400 over the next five years. The analysis also considered the regional nature of housing in this area and showed a 6-county regional gap of 2,400 units (Summit, Park, Eagle, Lake, Grand, and Clear Creek Counties).

The survey targeted both residents and employees in order to capture those currently living in the county as well as those working in the county who would like to live there if housing was available. The survey was available in English and Spanish, and findings outlined that the Spanish-speaking community is disproportionately affected by housing costs and issues. Compared to white non-Hispanics, they are 2.5 times more likely to be low income (under 80 percent of AMI), twice as likely to be cost burdened, have less than half the homeownership rate, and twice as likely to be experiencing unsafe living conditions. These findings raised awareness among policymakers of the severity and variety of housing problems and impacts on vulnerable populations. Following this study, the Housing Authority and partners began to define policies and programs that would address the needs identified.

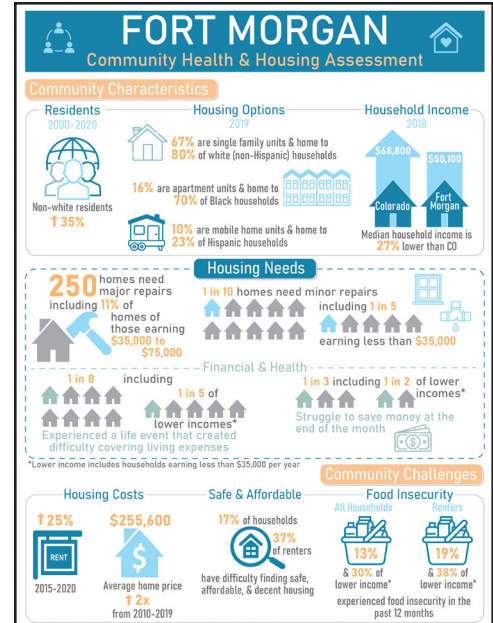
**Community Health and Housing Assessment  
Fort Morgan, Colorado**

Fort Morgan is located in the Eastern Plains of Colorado and home to a significant immigrant and refugee community. Food manufacturing is a central component of the local economy, drawing employees from as far as one hour away. A lack of new housing development over the past 20 years has put pressure on the local housing inventory, both in terms of quality and affordability. The diverse nature of the community has also meant that housing challenges are not faced equally among community groups. For this reason, a health equity approach was taken to better understand housing needs and opportunities within the community.



Fort Morgan Cultures United for Progress (FMCUP), in partnership with the City of Fort Morgan, undertook this study to better understand what housing and health equity challenges the community faced and to produce an actionable strategy to be used as an advocacy tool to address housing issues.

Through data analysis, outreach to key stakeholders, and a community survey fielded in four languages (online and in-person by community canvassers), EPS characterized community health issues related to the availability, affordability, condition, and location of housing. Key components of this analysis included identifying the biggest challenges, threats, and opportunities around housing, the populations most in need, where housing deficiencies exist, barriers to addressing these issues, and opportunities to implement change. The result of the study is an action plan for FMCUP that identifies its role and those of various community partners (public, private, and nonprofit) in addressing identified issues and working towards community change.



### Chaffee County Housing Strategy Salida, Buena Vista, and Poncha Springs, Colorado

Chaffee County, situated among 14,000-foot mountain peaks in the Arkansas River Valley and within 2.5 hours of the growing Denver and Colorado Springs metropolitan areas, is rich in recreational attractions yet historically has had housing that was considerably less expensive than other Colorado mountain communities. With the publication of several articles in national newspapers and magazines, including being listed as one of Outside Magazine’s best small towns, second home construction and tourism have grown. Chaffee County is also increasingly appealing to retirees from the Front Range urban areas. These market and demographic forces are changing the area and increasing the cost of housing for local residents and workers.



In 2016, EPS prepared an updated Housing Needs Analysis for Chaffee County, building on previous work completed in 2006. The focus of this update was on implementation measures and policies, as the major themes and trends in the communities had been stable but affordability challenges had increased

substantially. There were also a number of new opportunities for expanding the affordable and attainable housing supply, including partially developed subdivisions with heavily discounted land as a result of the great recession and the City of Salida’s Vandaveer ranch property. This work included outreach to policy makers, staff, and the development and real estate community, market demand and project feasibility analysis, and recommended implementation strategies.

**Beartooth RC&D Regional Housing Study and Needs Assessment  
Joliet, Montana**

EPS worked with Beartooth RC&D in Southern Montana to provide an assessment of the housing market for a diverse five-county area, looking at present and future demands, characteristics of the housing stock, and barriers to new development. The study examined the policy approaches and tools that can be applied to best meet each area’s housing needs. The report is being used to offer a basis for county and community leaders and stakeholders for creating community specific housing priorities, policies, and strategies.

**Housing Strategy  
Clear Creek County, Colorado**

Clear Creek County lies along the I-70 Mountain Corridor that traverses the Clear Creek river valley bottom between Metro Denver and the mountain resorts in Grand, Summit, and Eagle Counties. To many, it is a “drive through” for accessing major resorts and developed recreation areas. The County has suffered economically from the decline in mining and the intermittent closure announcements from Henderson Mine near Empire. As a pass through and day-trip destination, tourism does not have the same economic impact it has in the more developed resort areas and has not replaced mining as an economic base. The growth of Metro Denver however is benefiting Clear Creek County, except for the traffic impacts of I-70. As a close, lower cost, and accessible destination, there has been increased investment in tourism and recreation facilities and growth in business for many long-time establishments. There are serious worker shortages that are constraining economic growth and the customer and visitor experience. The lack of growth and incentive for housing reinvestment has also created serious substandard housing conditions.



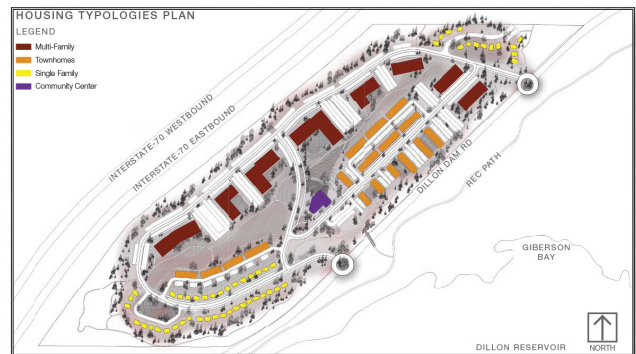
EPS was hired to prepare a Housing Needs Assessment and Development Strategy for the County. EPS determined that most housing needs could be addressed with market rate housing, but the challenge was to attract private investment. The recommendations included prioritizing municipal and County land assets for P3s with private developers, supporting nonprofit builders active in the county, and continuing their persistence in promoting and marketing infill lots to private developers and nonprofits. EPS also work with a development planning firm to prepare a feasibility study for developing a 6-acre County-owned site with workforce housing, including massing diagrams and infrastructure cost estimates

**Affordable Housing Mitigation Strategies  
Mountain Village, Colorado**

Mountain Village retained EPS to provide affordable housing mitigation strategies that covered all uses of new development. The mitigation model that EPS constructed identified both the employment generation rates for all types of residential product as well as all types of commercial uses. Following the employment generation rates, the model identified the financial gaps faced by local households. These factors were used to generate mitigation programs that the Town began applying to development requests immediately following the adoption of the program. The benefit will be the construction of dedicated affordable housing and/or the generation of fees that the Town will use to fund its development efforts.

**Lake Hill Workforce Housing Development Impact Study  
Summit County, Colorado**

Under the Obama Administration, the US Forest Service conveyed to Summit County a 45-acre site between Dillon Dam Road and I-70 between Frisco and Dillon. The legislation restricts any development of the site to workforce housing. Summit County Housing, a County Department, intends to be the master developer of the property and partnering with other non-profit and private for-profit housing developers. The County prepared a Master Plan for the property with an extensive public process and rigorous programming and feasibility testing. The Master Plan proposes over 900 units of mixed income rental and for-sale housing restricted to the Summit County workforce. The County PUD process requires an Impact Study for any project over 150 units, to address impacts on County and municipal services, traffic, public safety, and water and wastewater. EPS led a team comprised of EPS, a transportation planning firm, and a water and wastewater engineering firm to prepare the



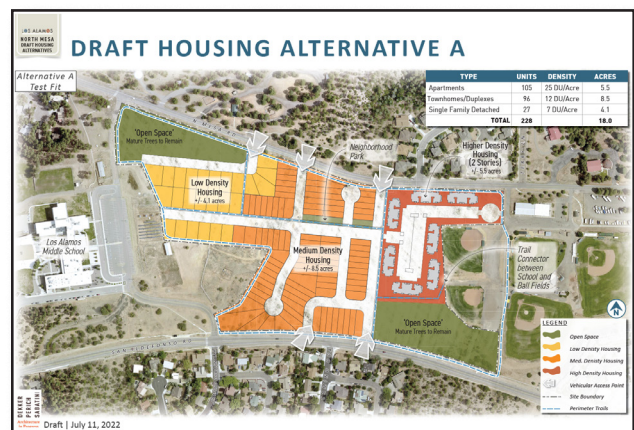
impact study. EPS was responsible for the fiscal impact (cost of services) aspects of the Study and for managing the subconsultants and overall study process. The water and wastewater analysis are ongoing, pending completion of related capacity studies by the sanitation district.

### Strategic Housing Plan Glenwood Springs, Colorado

While Glenwood Springs has historically been a relatively affordable community in the context of the Roaring Fork Valley, the city has recently faced significant housing market pressures as the Roaring Fork Valley has experienced a surge in real estate market interest and up-valley communities, such as Basalt and Carbondale, have become increasingly inaccessible. As a result, Glenwood Springs has been facing challenges in housing the local workforce and ensuring housing stability for longtime residents. EPS is currently working with the City of Glenwood Springs to develop an updated strategic housing plan. The plan is evaluating a range of housing policy tools that the City can use to create and preserve affordable housing, including a density bonus, land banking, land trusts, mobile home park preservation, dedicated funding sources, and public-private partnership model. In addition, EPS is preparing a housing needs assessment to highlight market conditions and inform policy approaches.

### North Mesa Housing with Recurring Revenue Study Los Alamos, New Mexico

Los Alamos has an acute shortage of housing at all income levels, a challenge exacerbated by size of the Los Alamos National Laboratory (LANL) workforce. Approximately half of the 12,000 LANL employees commute into the community daily from adjacent Santa Fe and Rio Arriba Counties and even the northern reaches of the Albuquerque metro area 90 minutes to the south. Additionally, because of the higher salaries of the LANL workforce, a significant share of the essential community workforce including teachers and other staff employed by Los Alamos Public Schools (LAPS) and Los Alamos County is priced out of the local housing market and forced to commute in as well. With little available workforce housing, LAPS has struggled to recruit and retain teachers and administrative staff. The School District has been evaluating options to utilize a 29-acre parcel of school district property adjacent to Los Alamos Middle School on North Mesa for housing appealing and affordable to its employees as well as others in the community workforce such as police, fire, and other municipal workers.

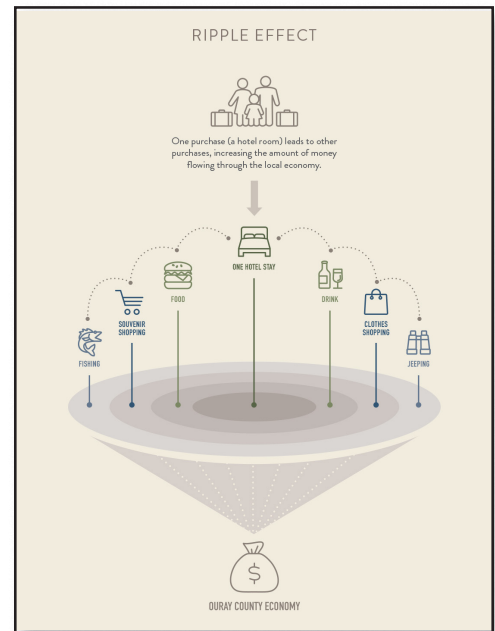


In March 2021, LAPS and the County signed a memorandum of agreement (MOA) to begin planning for the development of workforce housing on this site. The County hired EPS to complete a market analysis to refine the housing program and mix that would be supported on the site and to identify a financially feasible and legally viable ownership and disposition strategy that meets LAPS’s goal for recurring revenues.

EPS identified potential options for capturing the site’s land value as ongoing annual revenue for LAPS and evaluated the strengths and weaknesses of each tool. This analysis, along with pro forma financial modeling to test development alternatives and provide a cash flow analysis for development options, was used to identify a recommended project strategy for LAPS. The recommended workforce development program was identified based on the pro forma model comparison of revenue potentials, legal considerations, and balancing affordable housing objectives against maximizing revenues.

**COVID-19 Economic Resiliency Plan  
Ouray County, Colorado**

Ouray County is a county of 5,000 people nestled around the San Juan Mountains. With an economy driven by tourism and outdoor recreation, the COVID-19 pandemic was a major shock to the local economy, as businesses struggled to manage public health, worker shortages, and a surge of visitor activity in the summer and fall of 2020. EPS worked with Ouray County to develop strategic initiatives that effectively address the economic challenges from the COVID-19 pandemic. The work built on our analysis of local economic sectors with the greatest exposure and those best positioned for recovery and expansion. EPS also mapped out processes and structural relationships between the County, its jurisdictions, and State agencies to improve the communication and implementation of COVID-19 related regulations and assistance. The impetus of the study was to help local residents, business owners, and jurisdictions become proactive in thinking about how to measure the impact of future shocks to the system, and how to build economic resiliency to effectively manage these shocks as they arise in the future.



This effort involved significant analysis on the structure of and trends in the Ouray County economy, business sentiment, visitor activity, and the local public health and emergency management system. At its core, it was a data-driven effort calibrated to reflect local understanding of key issues. The study culminated in a series of recommendations on how Ouray County can foster economic resiliency and position itself for current and future challenges.

Recommendations were organized into four major categories: Communications, Readiness to Access Sources of Aid, Regional Economic Resiliency, and Tactical Recommendations for businesses. In addition, EPS developed an updated set of recommendations that built on the goals presented in the 2011 Ouray County Bottom-up Economic Development Strategy, with a particular focus on the progress Ouray County has made and how it can use these goals to advance economic resiliency.

## References

### **Town of Mountain Village**

*Affordable Housing Mitigation Strategies*

Michelle Haynes  
Planning and Development Services Director  
970 239 4061 | mhaynes@mtnvillage.org

### **City of Fruita**

*Fruita Housing Funding Strategy*

Dan Caris  
Director, Planning & Development  
970 858 0786 | dcaris@fruita.org

### **Summit County, Colorado**

*Housing Needs Assessment*

Brandon Howes, AICP  
Housing Planner  
970 668 4201 (o) | 970 409 7376 (m) | Brandon.Howes@summitcountyco.gov

### **Town of Breckenridge**

*Short Term Rental Regulatory Fee Study*

Rick Holman  
Town Manager  
970 547 3166 | rickh@townofbreckenridge.com



323 West Main Street | Suite 202 | Frisco, CO | 80443

## AREAS OF EXPERTISE

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**SE Group** works with communities to envision their future and plan accordingly, unlocking their potential and staying true to their values. We are an integrated team of seasoned professionals that includes community planners, landscape architects, open space and recreation specialists, environmental planners, and engagement specialists. Our work includes:

- **Comprehensive Master Planning**
- **Site & Land Use Planning**
- **Environmental Planning**
- **Project Management**
- **Community Engagement & Visioning**
- **Landscape Design & Architecture**
- **Connectivity & Mobility Planning**

## FIRM HISTORY

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Founded in 1958, our team benefits from over 60 years of company experience working in places—including many right here in Colorado—where “quality of life” is often the defining community objective. Our company focus is in communities influenced by a strong commitment to sustaining the natural environment, that are shaped by visitation and tourism, that promote and encourage access to the outdoors, and that value planning to establish a strong economic framework for the future. Through the years, we’ve become leading experts in working with communities in fragile environments where short-term choices have profound long-term effects.

Our experience has taught us that:

***Great communities know who they are.*** They have a vibe and character that defines why people live there. Their uniqueness and authenticity are essential to their being. We know that great long-term plans are built by focusing on what brings a community together.

***Just as no two communities are alike, no two community planning projects are alike.*** We listen and work closely with clients to tailor the approach that makes the best sense for their community, customizing our processes and public engagement efforts, accordingly.

***The best processes balance the interests of people, property, place, and profitability.*** Doing this takes deep listening, experience, and a highly thoughtful approach that examines multiple scales of decision-making: long and short term, fine and large grain, local as well as regional.

***Planning is about pragmatism wrapped around a clear vision.*** We work with communities to develop and communicate that vision in a clear, inspiring way. Compelling graphics, clear maps, succinct policies, and easy-to-use documents are hallmarks of SE Group’s work.

# SE GROUP COLORADO HOUSING PROJECTS

## Leadville/Lake County Affordable Housing Site Analysis Colorado



REFERENCE:  
Jacki Whelihan / 719.486.4102  
Housing@co.lake.co.us

SE Group assisted the City of Leadville and Lake County with a site analysis process that examined several potential locations for affordable housing in the City of Leadville. In collaboration with a design and engineering firm, we developed a report that summarized conditions, infrastructure needs, and potential design programs for each site. The City and the County are now poised to leverage grant funding to implement these projects. This process also involved a multi-step public engagement process that solicited input from English and Spanish speakers in the community. The results underscored the acute need for housing in the area as well as residents' feelings of stress related to housing.

## Telluride/San Miguel County Rezoning and Housing Assistance Colorado



REFERENCE:  
Kevin Geiger / 970.728.2153  
KGeiger@telluride-co.gov

SE Group assisted the Town of Telluride and San Miguel County through a rezoning process of 39 acres to a new affordable housing zone designation. This work included putting together the entire rezoning application, attending Planning Commission and Board of County Commissioner hearings, and strategizing with Town and County staff on how to make the rezoning a successfully passed initiative. It passed and is now in the site plan development stage.

## HB21-1271 Affordable Housing Strategies Assessment Colorado



REFERENCE:  
Andy Hill / 303.864.7720  
andy.hill@state.co.us

SE Group assisted the Colorado Department of Local Affairs (DOLA) with an initial screening process for a new affordable housing grant program created by **Colorado House Bill 21-1271**. Our team worked with DOLA to develop a framework to evaluate communities' compliance with the bill.



# Fruita in Motion: Comprehensive Plan

Fruita, Colorado

The planning process for the City of Fruita’s Comprehensive Plan “Fruita in Motion” involved extensive collaboration with the City and public engagement with the community. Five plan themes showcase the approach the plan will take with its goals and policies: efficient development; community first, tourism second; a thriving downtown, connectivity; and strategic economic development.

The economic development strategy in this plan is one of “quality of place.” The idea behind this strategy is to support existing businesses while also making the community an attractive place to live. This in turn will attract new residents and businesses that want to be located in the community because of its sense of place and amenities.

One of the policies that came out of the “efficient development” theme is to promote and support a larger diversity of housing types. Without going as far as developing an affordable housing program, the city hopes that allowing and incentivizing more types of housing and more units per acre will promote some natural affordability within the community.

Additionally, Fruita has the desire to cultivate recreational assets, especially trails, but not to the detriment of the community character. Currently many of the trail networks are a few miles away from the city on nearby public lands. One goal of this plan to is connect the trail systems to paved pathways within the city so that it is all one functioning network and the city itself becomes the trailhead.

The Comprehensive Plan was adopted in February of 2020.



REFERENCE:  
Dan Caris | City of Fruita  
Planning & Development  
Director  
970.858.0786 office  
dcaris@fruita.org



# Minturn Community Plan Update



Town of Minturn, CO

SE Group is currently working with the Town of Minturn on an update of the town’s Community Plan. The Community Plan will encompass all aspects of the town’s growth and development and will summarize community goals and priorities. The planning effort leverages the expertise of a multi-disciplinary team of subconsultants, including StudioSeed, Economic & Planning Systems, Fehr & Peers, and TetraTech. At present, the team is in the plan drafting phase and anticipates the adoption of the final plan in Fall 2022.

The Minturn Community Plan effort has been conducted alongside several other engagement and planning processes in the Town of Minturn. Since the Community Plan update process began in the fall of 2021, the Town has also initiated an update of its zoning, an area plan for one of the town’s most popular parks, an update of the Town’s design standards and guidelines for its historic downtown area, and a statistically valid community survey. The Community Plan attempts to encapsulate all of these ongoing activities and initiatives and relate them to the broader vision for the community.

As with any community plan effort, public engagement has been a core element to this process. Our team has conducted an open house and developed an interactive project website. A large Steering Committee has also helped to provide input on the planning process and contents at multiple points during this process.

**REFERENCE:**  
Michelle Metteer | Town Manager  
manager@minturn.org  
970-827-5645 x8



*Mixed Use 2 (MU2)*

*Parcel 2*

Parcel Dimensions: 5000 (50' x 100')

Lot Coverage: 40%

Impervious: 71%

Use: SF Home + ADU

Parking: Detached Garage

0' x 100')

PRIMARY STREET



# Brian Duffany

Principal

**Brian Duffany** is a real estate economist and planner with nearly 20 years of experience in land economics. Brian has a broad base of experience in real estate development feasibility analysis, housing strategies, financial and economic modeling, economic development, economic and demographic analysis, local government finance, fiscal impact analysis, transportation planning. Brian has evaluated proposals and feasibility for development and redevelopment proposals throughout the mountain west and Colorado urban corridor.

### SELECTED PROJECT EXPERIENCE

- **SHORT TERM RENTAL REGULATORY FEE | BRECKENRIDGE, CO**  
Regulatory fee study and policy advisory services to the Town. Prepared an economic analysis of short term rentals to demonstrate a reasonable relationship between a new regulatory fee on short term rentals and their impacts on workforce housing.
- **LUMBER YARD MARKET ANALYSIS | ASPEN, CO**  
Market analysis for a City-owned redevelopment project aimed at workforce housing. Provided input on how to prioritize housing resources in determining the development program and unit mix for the site. Analyzed housing supply, housing demand, employment trends, demographic trends, and housing market trends in the Aspen and Roaring Fork Valley area.
- **HOUSING STRATEGY | CHAFFEE COUNTY, CO**  
Worked with a housing task force and stakeholder group to document affordability issues and develop implementation strategies and recommended actions. Stakeholder group included business, real estate, local government, and social services interests. Recommendations included creating a local funding source, public-private partnerships, supporting multifamily development, and forming a nonprofit housing organization.
- **LAKE HILL IMPACT STUDY | SUMMIT COUNTY, CO**  
Fiscal, economic, and infrastructure impact analysis for the development of the Lake Hill property as workforce housing. Impact analysis supports the County's entitlement process for this property that was purchased from the USFS by Summit County.
- **HOUSING STRATEGY | CLEAR CREEK COUNTY, CO**  
Needs Assessment and housing development strategy to address workforce attraction and retention challenges and economic sustainability in mining and tourism communities. Also included a development feasibility study for workforce housing on County-owned land in Dumont.

#### Education

Master of Regional Planning, Cornell University  
Bachelor of Arts, Colby College

#### Employment History

23 Years Experience  
18 Years with EPS

#### Affiliations

American Planning Association  
Urban Land Institute  
Colorado Municipal League

#### Awards

West Vail Master Plan



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730 17th Street, Suite 630, Denver, CO 80202



720 460 3302 (direct)



bduffany@epsdenver.com



● **HOUSING REVENUE FUNDING PLAN | FRUITA, CO**

Ongoing policy and technical study on funding options for workforce housing. Forecasting revenue options and evaluating specific program options for the use of funds. Facilitating discussions with City Council and an advisory group.

● **FRUITA IN MOTION | FRUITA, CO**

Economic consultant to planning team and staff to evaluate issues and recommend policies and strategies on housing affordability, housing diversity, economic development (recruitment, marketing, incentives), and fiscal sustainability.

● **HOUSING MITIGATION FEE STUDY | PAGOSA SPRINGS, CO**

Prepared a nexus study and housing linkage fee calculation to support discussions on adopting an affordable housing impact fee to mitigate the impacts of market rate housing and second homes on the Town's affordable housing needs.

● **WEST STEAMBOAT NEIGHBORHOOD ANNEXATION | STEAMBOAT SPRINGS, CO**

Fiscal impact analysis for a proposed 400-acre annexation into the City of Steamboat Springs. Supported development agreement negotiations by addressing issues ranging from the benefits of deed restricted workforce housing to public works capital and O&M costs. Annexation was approved following a Council decision and the overturning of a referendum to reverse the Council's decision.

● **INCLUSIONARY ZONING AND LINKAGE FEE STUDY | FORT COLLINS, CO**

Housing policy study to evaluate the effectiveness of an inclusionary housing ordinance (IHO) and linkage fee program in Fort Collins. Developed a nexus study and real estate proforma feasibility model to test the viability of adopting residential and commercial housing linkage fees. Facilitated stakeholder and council member discussions on the pros and cons of the tool and options for implementation.

● **DOWNTOWN HOUSING STRATEGY | BILLINGS, MT**

Market, feasibility, and development opportunity analysis to create a strategy for attracting more housing to Downtown Billings. Conducted interviews, downtown employee survey, and site analysis to recommend priority sites and housing product types. Recommended uses for tax increment financing ranging from direct project incentives to area wide investments.

● **GROWTH POLICY UPDATE | BOZEMAN, MT**

Comprehensive economic and real estate market analysis to inform the land use and economic aspects of the Comprehensive Plan Update. Addressed supply, demand, and impediments in the office, retail, and industrial markets. Quantified housing affordability conditions and the impact of job relocations and workforce migration from high-cost metro areas on the local housing market.

● **HOUSING AND COMMUNITY SUSTAINABILITY STUDY | FLAGSTAFF, AZ**

Analysis of affordable housing needs, economic linkages between housing and the City's economic base. Developed housing and economic development strategies to promote long-term economic and social sustainability.

● **PEER COMMUNITIES CAPITAL FUNDING COMPARISONS | AVON, CO**

Comparison of revenue and expenditure sources and uses in Summit and Eagle County to inform Town Council on fiscal sustainability, options for funding capital projects, and considerations on altering the Town's Real Estate Transfer Assessment to fund workforce housing and/or additional capital need.



# Carson Bryant

Associate

**Carson Bryant** has significant experience with housing market analysis, housing policy, affordable housing strategy, and community development. He has worked on a variety of projects across the region and has a strong skill set for identifying policy issues, and formulating creative approaches to address them.

### Education

B.A. in Economics and in German - Washington and Lee University

### Employment History

3 Years with EPS

### Previous Experience

Fulbright teaching fellowship, Nuremberg, Germany

Washington and Lee University Real Estate Society

Charlotte Chamber of Commerce Intern

### SELECTED PROJECT EXPERIENCE

- LUMBER YARD MARKET ANALYSIS | ASPEN, CO**

Prepared a market analysis for the Lumber Yard property, a City-owned redevelopment project aimed at workforce housing. Provided input on how to prioritize housing resources in determining the development program and unit mix for the site. To assess the most pressing and relevant target market for the project, EPS completed an analysis of housing supply, housing demand, employment trends, demographic trends, and housing market trends in the Aspen and Roaring Fork Valley area.
- CARBON COUNTY HOUSING FEASIBILITY STUDY | CARBON COUNTY, MT**

Assessed housing market conditions for the Red Lodge Area Community Foundation to construct housing prototypes for workforce housing developments. The study focused on the areas of greatest need in the housing market as well as current development conditions, such as rents and construction costs. This research supported a financial feasibility analysis of two prospective workforce housing developments in the County, which the foundation is using to inform future partnerships with developers.
- LOVELAND AFFORDABLE HOUSING TASK FORCE SUPPORT | LOVELAND, CO**

Analyzed housing market conditions in Loveland and the surrounding region using supply- and demand-side data to highlight affordability issues, including trends in home prices, rents, development costs employment, and commuting. Developed a strategic framework of policy approaches to address housing affordability that included regulatory changes, funding sources, and partnerships. Based on the findings, recommendations were made to inform task force policy decisions.
- HOUSING FUNDING PLAN | FRUITA, CO**

This study focused on generating new revenue streams and how those funds can be most effectively allocated to create workforce housing options. The study also modeled various housing programs, including a down payment assistance and an ADU program, to



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www.epsys.com



730 17th Street, Suite 630, Denver, CO 80202



303 623 3557



cbryant@epsdenver.com



determine the impact of new funding in relation to housing targets and to determine the financial feasibility of establishing a revolving loan fund for the City.

● **PITKIN COUNTY ECONOMIC ANALYSIS STUDY | COLORADO**

EPS is conducting a comprehensive study of the community and economy focusing on current trends, the impacts of the COVID-19 pandemic, and future challenges. The study uses a wide range of data sets, including those related to demographics, employment, housing, fiscal revenues, mobility, school enrollment, and transit ridership, to articulate the changing dynamics of the county economy and community composition. The analysis will inform future policy decisions around land use and growth management.

● **GLENWOOD SPRINGS STRATEGIC HOUSING PLAN | COLORADO**

EPS is currently working with the City of Glenwood Springs to develop an updated strategic housing plan. The plan is evaluating a range of housing policy tools that the City can use to create and preserve affordable housing, including a density bonus, land banking, land trusts, dedicated funding sources, and public-private partnership model. In addition, EPS is preparing a housing needs assessment to highlight market conditions and inform the policy approaches.

● **INCLUSIONARY ZONING AND LINKAGE FEE STUDY | FORT COLLINS, CO**

Housing policy study that evaluated the effectiveness of an inclusionary housing ordinance (IHO) and linkage fee program in Fort Collins. This included an analysis of housing market trends and employment trends to frame the recommendations related to IZ and linkage fee programs.

● **BEARTOTH RC&D REGIONAL HOUSING STUDY AND NEEDS ASSESSMENT | JOLIET, MT**

EPS worked with Beartooth RC&D in Southern Montana to provide an assessment of the area's housing market, looking at present and future demands, characteristics of the housing stock, and barriers to new development. The study examined the policy approaches and tools that can be applied to best meet the area's housing needs. The report is being used to offer a basis for county and community leaders and stakeholders for creating community specific housing priorities, policies, and strategies.

● **LOS ALAMOS NORTH MESA REDEVELOPMENT | LOS ALAMOS, NM**

EPS is conducting a housing market analysis and redevelopment feasibility study for the City of Los Alamos. The goal is to assess the feasibility of land disposition strategies for parcels owned by the county school district, which the City intends to redevelop into workforce housing. EPS is testing the opportunities and constraints of various product mixes and development prototypes, as well as ground lease arrangements for the site that generate recurring revenue for the school district.

● **HOUSING AFFORDABILITY STUDY | OKLAHOMA CITY, OK**

Examined housing supply and demand factors, growth patterns, regulatory barriers, and overall affordability conditions. Assessed the segments of the population that are cost-burdened and at most risk of displacement. The study sought to determine Oklahoma City's housing needs, and drew on existing data, stakeholder engagement, and extensive survey data.

**GABBY VOELLER, AICP**  
SENIOR COMMUNITY PLANNER



Gabby is a multi-faceted planner with a passion for helping clients solve the most complex problems facing their communities. She applies both technical and analytical skills to all aspects of community planning. Gabby approaches projects with a mind geared toward seeking out innovative and engaging solutions that move communities closer towards their vision and goals.

### Experience

Working in both private and public sectors, Gabby has widespread knowledge and experience managing multi-modal transportation planning, recreation and trails planning, and community planning and development projects. She excels at crafting and facilitating creative public engagement processes and making compelling maps and infographics for plan documents. She has authored environmental analyses and impact studies. Gabby joined the SE Group team in 2016.

Gabby has a Master of Regional Planning from Cornell University and a Bachelor of Science in Chemistry from Bates College.

### Areas of Expertise

- Community Planning
- Affordable Housing
- Transportation Planning / Land Use + Transportation Modeling
- Community Engagement

### Affiliations/Memberships

- American Planning Association, Colorado Chapter, Northern New England Chapter

### Appointments

- City of Leadville Planning + Zoning Commission

### Presentations

- “UrbanSim,” APA Colorado conference, 2014
- “Creating Connections between Recreation and Transportation” APA Colorado conference 2016
- “Partnering with Colorado’s Public Land Managers,” APA Colorado Conference, 2017
- “Progressive Planning on the Western Slope” APA Colorado Conference 2020

### Projects

- City of Cañon City Arkansas River Corridor Master Plan, Colorado
- City of Fort Morgan Trails Master Plan, Colorado
- City of Fruita Comprehensive Plan Update, Colorado
- City of Fruita Land Use Code Update, Colorado
- Clear Creek County 2017 Community Master Plan, Colorado
- Cuchara Mountain Park Master Plan, Colorado
- City of Aspen Uphill Economy Recreation Plan, Colorado
- Dillon Reservoir Recreation Area and Summit County RecPath System Capacity Analysis, Summit County, Colorado
- Eldorado Canyon State Park Visitor Use Management Plan, Colorado
- Estes Valley Recreation and Park District Comprehensive Master Trails Plan, Colorado
- Pagosa Springs 2018 Comprehensive Plan, Colorado
- Pilot Hill Land Use Plan, Laramie Wyoming
- Town of Breckenridge Gondola Feasibility Study, Colorado
- Town of Frisco Community Plan Assistance, Colorado
- Town of Frisco Three Mile Plan, Colorado
- Town of Frisco Trails Master Plan, Colorado
- West Vail Master Plan, Colorado
- City of Chisholm Comprehensive Plan, Minnesota
- Lake County Parks, Recreation and Open Space Plan, Colorado
- Minturn Community Plan & Downtown Design Guidelines, Colorado
- Town of Eagle Open Space and Trails Plan, Colorado
- DOLA Affordable Housing Strategies Analysis, Colorado
- Leadville/Lake County Affordable Housing Site Analysis, Colorado
- Telluride/San Miguel County Community Housing Rezoning, Colorado

**JULIA RANDALL**  
ANALYST & PLANNER



Full of curiosity, Julia loves getting to know the communities she works in and enjoys the challenge of building consensus among stakeholder groups. With every project, Julia seeks to develop innovative land use and policy solutions that reflect a community’s values, build resiliency, and improve overall quality of life. Julia’s considerable skill as a writer and passion for sustainable, inclusive recreation make her an asset to any project team.

**Experience**

Julia specializes in land use and policy analysis, public engagement, and environmental permitting. Julia is a member of the Community Planning and Design team and also supports all practice areas at SE Group.

Prior to joining SE Group, Julia studied recreation and tourism internationally and close to home – she completed a research fellowship on ecotourism in Thailand, and she has produced two reports analyzing visitor use management in the Adirondack High Peaks.

Julia holds a Bachelor of Arts in English from Williams College.

**Areas of Expertise**

- Technical Writing & Research
- Community Engagement & Visioning
- Policy Analysis
- Permitting

**Appointments**

- Commissioner, City of Burlington, VT Planning Commission (2022-present)

**Awards**

- Colorado APA Merit Award: West Vail Master Plan (2022)

**Projects**

- City of Montpelier Web-Based Plan Vermont
- Lyndonville Route 5 Corridor Assessment, Vermont
- Town of Waitsfield Bylaw Modernization, Vermont
- Marshall Mountain Park Master Plan, Montana
- City of Mena Vision Plan, Arkansas
- Town of Conway Comprehensive Plan, New Hampshire
- West Vail Master Plan, Colorado
- City of Chisholm Comprehensive Plan Update, Minnesota
- Grant County Comprehensive Outdoor Recreation and Trails Master Plan, New Mexico
- Minturn Community Plan Update, Colorado
- Norwood Trails Assessment, Colorado
- Leddy Park Comprehensive Plan, Vermont
- Colorado Department of Local Affairs Affordable Housing Qualifying Strategy Evaluation, Colorado
- Leadville/Lake County Affordable Housing Site Analysis
- City of South Burlington Land Development Regulations Review and Support, Vermont
- Bromley Ski Act 250 Permit Support, Vermont
- Bolton Valley Act 250 Permit Support, Vermont
- Minnesota Off-Road Vehicle Master Plan, Minnesota
- Cumberland Plateau Outdoor Recreation Plan, Virginia
- Rib Mountain State Park Recreation Needs Assessment, Wisconsin
- Brandywine/Boston Mills Lift Replacement Planning
- Jack Frost/Big Boulder Lift Replacement Planning



**AVERY WOLFE**

## PLANNER

**Areas of Expertise**

- Community Engagement & Visioning
- Technical Writing & Research
- Policy Analysis
- Data Analysis

Avery is values-driven and has found passion in the planning field through her curiosity, analytical approach, and effective communication. Avery's work ethic and attention to detail ensures high-quality deliverables informed by strong analysis, data, and community input. She enjoys bringing all the essential pieces of a project together to create truly useful and vetted solutions catered to specific client and community needs.

**Experience**

Avery's passion and expertise centers around the topics of housing and land use, utilizing skills in policy and data analytics, community engagement and visioning, and mapping. Previously, Avery served community clients as a planner for JM Goldson, a small consulting firm based in Boston. This is where Avery established her experience working with a wide variety of stakeholders, collaborators, and municipal entities.

Avery holds a Bachelor of Arts in Environmental Studies from Bates College and is working towards a Masters of Urban and Regional Planning at the University of Colorado Denver.

**Projects**

- North Yuba Landscape Resilience Project EIS, California
- Frisco Trails Master Plan, Colorado
- Minturn Community Plan, Colorado
- Friends of the Front Range Wildlife Refuges Audio Visual, Multimedia, and Geographic Information Systems, Colorado
- Southwest Colorado Outdoor Recreation Strategy, Colorado
- City of Mena Vision Plan, Arkansas
- New Hampshire Outdoor Recreation Assessment, New Hampshire
- Town of Dedham Housing Study, Massachusetts\*
- Town of Winchester Master Plan, Massachusetts\*
- Town of Ipswich Community Development Plan and Housing Production Plan, Massachusetts\*
- Hamilton Housing Production Plan and update to Master Plan Housing Element, Massachusetts\*
- City of Medford Housing Production Plan, Massachusetts\*
- Eastham Strategic Plan, Massachusetts\*
- Mansfield Master Plan, Massachusetts\*

*\*Signifies project was completed while with previous employer*

# Cost Information

EPS and SE Group proposes to complete the project on a time and materials basis up to a maximum of \$78,940. The allocation of budget by task and staff is shown below in **Table 1**. The budget includes consultant hours as well as direct costs associated with travel and translation.

**Table 1. Proposed Cost by Task and Staff**

Description	Economic & Planning Systems			SE Group			Project Total
	Principal	Associate	EPS Total	Senior Associate	Planner	SE Group Total	
<b>Billing Rate</b>	<b>\$250</b>	<b>\$145</b>		<b>\$170</b>	<b>\$125</b>		
Task 1: Housing Needs Assessment	12	32	\$7,640	4	8	\$1,680	\$9,320
Task 2: Community Outreach	20	40	\$10,800	24	40	\$9,080	\$19,880
Task 3: Site Identification and Development Concepts	24	48	\$12,960	16	40	\$7,720	\$20,680
Task 4: Strategic Action Plan	28	48	\$13,960	30	32	\$9,100	\$23,060
<b>Total Hours</b>	<b>84</b>	<b>168</b>	<b>252</b>	<b>74</b>	<b>120</b>	<b>194</b>	<b>446</b>
<b>Total</b>	<b>\$21,000</b>	<b>\$24,360</b>	<b>\$45,360</b> 62%	<b>\$12,580</b>	<b>\$15,000</b>	<b>\$27,580</b> 38%	<b>\$72,940</b>
<b>Direct Costs</b>							
Travel (2 trips, 3-4 people per trip)							\$3,500
Live Translation							\$1,000
Materials Translation							\$1,500
<b>Total Direct Costs</b>							<b>\$6,000</b>
<b>Total Project Budget</b>							<b>\$78,940</b>
<b>Community Engagement</b>							
Focus Groups							4-6
Public Open House							1
Policymaking Body Work Session							1

Source: Economic & Planning Systems



Urban Rural LLC



&



**Proposal for Town of Paonia  
Housing Needs Assessment & Housing Action Plan**

February 8, 2023

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February 8, 2023

Dear Ms. Leslie Klusmire,

On behalf of Urban Rural Continuum LLC (URC) and Ayres Associates, Inc. (Ayres) I am excited to submit this proposal in response to the RFP to prepare the Town of Paonia’s first Housing Needs Assessment and Housing Action Plan. Our team of experts in housing, strategic planning, land use codes, and small towns will be the perfect fit for this project. URC is a local firm, located in the North Fork Valley just outside of Hotchkiss with significant experience preparing housing needs assessments, conducting strategic planning, and analyzing and revising municipal codes. With the addition of Ayres as our subcontractor, our team will also have the resources of a larger firm with experts to assist in strategic planning, development finance, GIS mapping, graphics production, and many more areas of expertise if needed.

Shay Coburn will be the project manager and primary day-to-day contact for this project. She can be reached at shay@urbanruralcontinuum.com or 720.464.5821. In addition to Shay, the primary team will consist of Andrew Coburn with URC and Josh Olhava and Mike Scholl from Ayres. Other Ayres staff will support the project, as needed. The team has decades of combined experience and we are confident that we can prepare a detailed Housing Needs Assessment and a robust Housing Action Plan for how to address that need in coordination with the community and stakeholders.

We truly care about our neighbors and are thrilled to submit this proposal. We pride ourselves on being flexible to meet client needs, and welcome the opportunity to discuss ways to adjust the scope, schedule, or budget to best meet your needs and facilitate action.

Please don’t hesitate to contact me for any additional information. I look forward to hearing from you.

Sincerely,

Andrew Coburn  
Urban Rural Continuum LLC  
andrew@urbanruralcontinuum.com  
720.464.5821

## PROJECT PROPOSAL

### CONSULTANT INTEREST, PROBLEM STATEMENT, DESCRIPTION OF PROPOSAL

Our team is very interested in this project because we believe that the best communities are made up of all types of people and households who deserve a home in which they can thrive. We believe that our small Colorado communities are the heart and soul of our state. We believe that working with a community to strategically and thoughtfully develop a plan for their future is the best way to ensure action. Most of all, the opportunity to work in our backyard with our neighbors is one that doesn't come around often, and we would be honored to take on this project for our community.

We understand that the Town of Paonia, like so many other Colorado communities, has experienced rising home prices, among many other housing market challenges. We have observed an older housing stock, as well as an older population. We understand Paonia is growing in popularity among retirees and young entrepreneurs. We understand there has been a moratorium on water taps since January 2020, which has halted new residential construction and exacerbated the housing crunch. We appreciate the Town's desire to understand current and future housing needs to plan for water distribution and collection system improvements and lift the moratorium.

We applaud the Town's desire to not only dig into its housing problems and challenges through the creation of a detailed Housing Needs Assessment but also the Town's desire to take action through the creation of a Housing Action Plan.

Our team envisions this project in two concurrent phases, the first phase being a Housing Needs Assessment (HNA) that provides a comprehensive analysis using the best information and data available to clearly define the current and future housing needs through 2028 in Paonia. The second phase will be a Housing Action Plan that details a prioritized and step-by-step approach for the Town to address the needs and gaps identified in the HNA and described by the community. The two phases are described in detail below, but first we detail the comprehensive community engagement process that will overlap the two phases.

In general, URC will complete about 75% of the scope of work with Ayres completing the other 25%. We are happy to discuss all components of this proposal and adjust to your needs.



## SCOPE OF WORK

### COMMUNITY ENGAGEMENT

Community engagement is vital to the success of this project. We will gather a lot of data, but listening to and learning from the lived experience of Paonia's residents and employers is crucial to completing the HNA. It is also how we will educate and involve the community in action planning - identifying ways that the Town of Paonia and other stakeholders can begin to reduce barriers to housing production, capitalize on opportunities, and generally invest in the hard, collaborative work involved in creating community housing that benefits the community, economy, and residents.

The community engagement strategy below is for Phase 1: Housing Needs Assessment and Phase 2: Housing Action Plan. It is inclusive and robust, with many opportunities for the community to be heard and informed. We envision leaning heavily on in-person meetings since we live in the North Fork Valley, but can also use virtual meeting platforms when that makes sense, such as for individual or small group meetings.

All outreach materials will be provided in Spanish. We will attempt to reach out directly to the Spanish speaking community through a targeted outreach meeting.

#### 1. KICK-OFF CALL WITH TOWN STAFF

The first step for this project will be a discussion with key Town staff to ensure joint understanding of the project scope and goals, to immediately initiate formation of the Housing Committee, learn about existing resources (lists of contacts, background documents, existing data, etc.), and set important dates.

#### 2. FORM THE HOUSING COMMITTEE

We propose to stand up a Housing Committee within the first two weeks following selection. We propose that it be a relatively small (12-15 members max), informal committee associated with this project, rather than a formal committee of the Town government. We see the Committee's role as advisory in which they review project materials before being distributed to the community, review preliminary findings, and generally provide guidance throughout the project. The Committee could be formalized in the future, but this approach will benefit this project and not impact the tight schedule.

#### Consultant Roles

Shay Coburn will lead all community engagement efforts with ample assistance from Andrew Coburn, especially for the employer questionnaire and Realtor/Property Manager Focus Groups. Shay and Andrew plan to be available in person for all engagement activities. Ayres will assist in preparing materials like fliers, posters, and meeting summaries in addition to attending Town Board meetings virtually if needed.





This Committee would ideally include people representing a cross section of the community from the public, private, and non-profit sectors. Potential participants could include someone from the Town Board of Trustees, Delta County Joint School District 50J, Delta Health, Paonia Chamber of Commerce, North Fork Senior Connections, the newly formed Community Land Trust, and a local realtor and property manager.

### 3. HOUSING COMMITTEE MEETING 1

This first meeting of the Committee would kick off the project and focus on roles, goals, and desired outcomes.

### 4. EMPLOYER QUESTIONNAIRE

This brief questionnaire would be developed to inform the HNA and will be targeted to all employers doing business in the Town of Paonia, large and small. In our experience, the information gleaned from such confidential questionnaires is imperative to identifying current and future housing demand. Once created, our team will work to distribute the questionnaire through existing formal networks like the Paonia Chamber of Commerce and in-person. Visiting businesses in person will allow us to share the questionnaire and information about the project and gather employer feedback. Visiting in person typically increases the response rate and the quality of the responses, which will be confidential and only reported on in aggregate to ensure sensitive business information is not published and cannot be associated with any business in Paonia.

### 5. REALTOR/PROPERTY MANAGER FOCUS GROUP OR INTERVIEWS

If possible, we will set up an in-person meeting with local Realtors and property managers to gather information about the local for sale and rental market. If the organization of such a meeting is impacting the schedule, individual interviews will be conducted to the extent practicable.



### 6. HOUSING COMMITTEE MEETING 2

During this second gathering of the Committee, we intend to share feedback received thus far and prepare for the Community-wide Open House, likely discussing potential strategies.

### 7. COMMUNITY-WIDE OPEN HOUSE

Our team will prepare an open house type meeting and invite the entire community. The open house format will include a quick introduction about the project and then shift to an interactive session where the community will have the opportunity to provide input about the housing market and their thoughts about priorities to address affordable housing in Paonia. This open house will be published widely with the goal of getting a large cross-section of the community to attend. We would create fliers in English and Spanish that could be stacked at cash registers throughout town, passed out in front of the post office, and available at other locations in the community (posting boards). Our team may even reach out to the North Fork Valley Creative Coalition to incorporate some sort of art into the Open House like a visual note taker, live painter, or a poet who could write during the event.

If desired, we could substitute this Open House for a resident survey. While resident surveys can be very helpful in collecting data, the data gathered is often duplicative with existing data and misses the opportunity to engage residents directly and provide space for meaningful conversation around the complexities of housing issues.

## 8. TARGETED OUTREACH MEETINGS

Our team will conduct targeted outreach, including to marginalized and vulnerable populations. We will attempt to attend regularly established meetings or meet them at their place of business or desired location to talk about their experience, challenges, and needs. This step will likely start before the Open House to stay on schedule. We propose meeting with some of the many churches in town, the Senior Center, the Spanish speaking community, among others. We will also seek to connect with owner/representatives and residents of the North Fork Trailer & RV Park even though it is not technically within the municipal boundary. We'd hope to also talk with anyone experiencing homelessness or displacement, though this can be a difficult population to reach. We anticipate around eight meetings.



## 9. HOUSING COMMITTEE MEETING 3

During this meeting, we will debrief the Open House, share findings from the Targeted Outreach Meetings, and discuss all input and data findings thus far in the project. We will also present and discuss the draft HNA, and briefly discuss strategies and the Action Plan.

## 10. TOWN BOARD MEETING

The draft HNA will be submitted to the Town in time for it to be part of the packet for the June 13th Town Board meeting. URC can attend this meeting in person if desired to present the report, gather input on the draft, and answer questions.

## 11. HOUSING COMMITTEE MEETING 4

During this meeting we will review and discuss the draft Housing Action Plan.

## 12. TOWN BOARD MEETING

The draft Housing Action Plan will be submitted to the Town in time for it to be part of the packet for the July 11th Town Board meeting. URC can attend this meeting if desired to present the report, gather input on the draft, and answer questions.

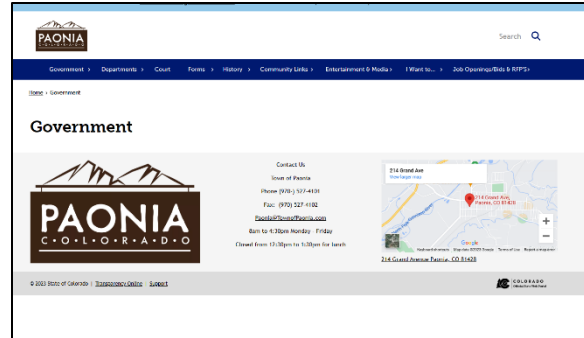
## 13. TOWN BOARD MEETING

URC can attend this meeting in person on July 25th if desired to present the final reports and answer any questions that may arise.

### Additional Engagement Tools

#### Webpage

Our team proposes to add a “Housing” page to the existing Town’s website. This webpage will be the one-stop-shop location for all information about this project. The page will include a short project overview, upcoming important dates like community meetings, and all documents created along the way including meeting summaries. Our team will prepare the content, but the Town would need to add it to the website. We believe this will help drive traffic to the Town’s website and after completion of this project, the page can evolve to include all housing resources like the HNA, Action Plan, and the existing Rent/Mortgage Assistance link.



We believe this will help drive traffic to the Town’s website and after completion of this project, the page can evolve to include all housing resources like the HNA, Action Plan, and the existing Rent/Mortgage Assistance link.

#### Getting the Word Out

We will use established resources to share surveys, meeting dates, and other important elements of this project like the Town of Paonia and Paonia Message Board Facebook Pages, The North Fork Merchant Herald, Delta County Independent, High Country Shopper, KVNF radio, and/or posted throughout town (i.e., at Don’s Market and the board in front of the Paonia Laundromat).

#### Coordination with Related Town Projects

To ensure alignment with other Town efforts, our team will coordinate with existing projects like the recently awarded Master Plan and any water studies/plans to address the water tap moratorium, to the extent practicable given the very tight timeline. Our team is available to work directly with other consultants if desired by the Town.

#### Meeting Summaries

Our team will create summaries from all Housing Committee meetings and the Open House. These will be simple summaries that can be an appendix to the Final Housing Action Plan if desired. Depending on the sensitivity of the feedback received during the Targeted Outreach Meetings, we will work to create a very high-level summary.

### COMMUNITY ENGAGEMENT DELIVERABLES

1. Employer Questionnaire
2. Meeting materials - fliers, advertisements, handouts, boards, presentations
3. Webpage content
4. Meeting Summaries

## PHASE 1: HOUSING NEEDS ASSESSMENT

We propose to analyze Paonia’s housing market and prepare and deliver a comprehensive, clear, concise, stand-alone Housing Needs Assessment (HNA) that is well documented. The HNA will analyze, consider, and report on demand and supply drivers, including the items outlined on page 4 of the RFP unless otherwise specified below.

The HNA will be prepared in the following manner, with many tasks occurring simultaneously.

### Consultant Roles

Andrew Coburn will lead the Housing Needs Assessment. Mike Scholl will help significantly with the development analysis. Ayres will also help with document creation.

### 1. Gather, Compile, and Analyze Public and Private Data

### 2. Develop and Distribute Employer Questionnaire

### 3. Meet with and Interview Key Stakeholders

### 4. Prepare a Draft Housing Needs Assessment

### 5. Revise Draft and Deliver the Final Housing Needs Assessment

As requested in the RFP, the Needs Assessment will include the following:

#### **Demographic Data**

All topics listed in the RFP will be assessed, except it should be noted that the RFP’s reference to household employment will be part of identifying the number of housing units needed in “Need and Gap Analysis” by looking at the number of households with a worker. Moreover, household income by tenure and AMI (30% to 180%, although this can be adjusted during the project if desired by the Town) will be covered under “Need and Gap Analysis.” Special needs populations, such as seniors, seasonal workers and the small homeless population in town will be discussed under “Special Populations.”

Primary data sources: U.S. Census Bureau, Colorado Demography Office, and ESRI.

#### **Economic Conditions**

All topics listed in the RFP will be assessed, but it should be noted that a lot of publicly available economic data is published at the county level. County data will therefore be used in conjunction with data for Paonia to assess the local economy, including trends and projections. Although job growth by sector can be included, we believe the sector change is less important than the overall projected change in the number of jobs and projected household income, both of which we will consider as part of the “Need and Gap Analysis” below. Two topics not requested in the RFP that are important to consider, and we propose including, are commuting and those working from home.

Primary data sources: U.S. Bureau of Labor Statistics, U.S. Census Bureau, Colorado Department of Labor and Employment, and ESRI. Additional sources may include the U.S. Bureau of Economic Analysis, University of Washington Center for Women’s Welfare Self Sufficiency Standard, and Data Axle.

### **Housing Stock and Trends**

Topics listed in the RFP that will be included are the age of the housing stock, the share of housing units by type (e.g., single family, multi-family, mobile/manufactured), and building permits (certificate of occupancy data will also be reviewed/used if available). Housing tenure will be included under “Demographic Data” above. The number of homes not occupied, often referred to as vacant, will be identified along with the share of these used as seasonal/vacation homes. We will also look at the housing stock by number of bedrooms relative to the size of households to identify whether and where the housing stock may be misaligned.

A deep dive and written or visual analysis of individual home conditions would likely mean certain property owners or areas of town would be identified/highlighted and, we believe, could have a deleterious effect on this project and the ultimate goal of seeking solutions. Therefore, the condition of homes will be considered generally by reviewing the age of the housing stock and conducting visual surveys to inform solutions to help with Paonia’s aging housing and stock of mobile homes in the Action Plan.

The density of the existing housing stock (number of units per acre) is not typically included in HNA’s and we are not proposing to do so. Rather, Paonia’s current residential density will be considered during action planning when reviewing the land use code, and in identifying barriers to new community housing.

We will review available information about homes used as short-term rentals, including any information the Town has. We also hope to learn the extent to which long term rentals are being converted to short term rentals, impacting the supply of rental units available to locals. We are well aware of the issues and tradeoffs associated with the rise of short-term rentals and will address them in the HNA and in action planning.

We will catalog existing affordable housing in the Town of Paonia, including deed or income restricted properties, along with their expiration dates if known. This inventory may be limited to the Creek Vista Senior Living apartments, but will be added to if additional properties are identified. The number of housing vouchers being used in Paonia (and any available but not in use) will also be identified if possible from interviewing the Delta County Housing Authority.

Primary data sources: U.S. Census Bureau, Colorado Demography Office, ESRI, building permit/Certificate of Occupancy data from the Town of Paonia, AirDNA, and the National Housing Preservation Database.

### **Homeownership Market**

We propose to obtain Multiple Listing Service (MLS) data and use ArcGIS to ensure the data is clipped to the Town of Paonia municipal boundary. We are very flexible, however, and are able to analyze data for a different geographic boundary, if desired. We will analyze the data and report on the number of home sales, the price of home sales (average, median, by price range, and by square foot if possible), and sales by the number of bedrooms, along with the months of inventory. If the data is available, we will also report on the financing type used, particularly the share of cash purchases. Ideally, we would get MLS data from 2018 through the end of 2022, and any 2023 sales, to be able to highlight five-year market changes, including Covid-era changes.

The rate of homeownership will be accounted for under tenure above. Although the vacancy rate can be provided, we believe that the more important metric is the months of inventory because the goal is to ensure a balanced homeownership market, which will be one component of how we intend to determine the number of new housing units needed by 2028.

Primary data sources: Multiple Listing Service. U.S. Census Bureau, Colorado Demography Office, and ESRI data may also be used.

### **Rental Market**

We propose to monitor rental listings from March 20 (assumed project start) through April 30th at minimum. We will track available rentals by price (to include median rental price), number of bedrooms, security deposit amount, whether utilities are included in the rental amount, and other important factors like whether pets are allowed. We will do so by scouring online platforms like Facebook and Craigslist, along with print publications like The North Fork Merchant Herald, Delta County Independent, and High Country Shopper. In addition, we will monitor hard copy listings on public posting boards around town, such as at Don's Super Market and Paonia Laundromat. The share of households who rent will be captured under tenure above. The vacancy rate will be manually calculated, although we will also consider vacancy information from the American Community Survey. This rate will be another key component of how we intend to determine the number of new housing units needed by 2028.

We will attempt to get aggregated utility data from local providers and summarize as much information as possible subject to data limitations. Even without data from private utility providers, we will obtain local utility cost information from interviews and other community engagement.

### **Special Populations**

We propose to learn about and report on housing issues faced by the following populations identified in the RFP to inform the action planning process.

- Seniors - information about senior housing demand and gaps in the market will be based at minimum on U.S. Census Bureau and ESRI data, interviews with North Fork Senior Connections, Paonia Senior Center, Creek Vista Senior Living, Paonia Care & Rehabilitation, and information gathered as part of broader public and stakeholder engagement.

- Seasonal Workers - information about seasonal workers will primarily come from key questions included in the employer questionnaire.

- Homeless - we will gather and report on the local homeless population to the extent we can. We propose to identify and interview key stakeholders, to include the Delta County Housing Authority, service providers, and those experiencing homelessness if possible. We will also interview the City of Delta Homeless Coordinator. Point-in-Time count data for the region will be reviewed and if possible discussed with one of the Western Slope regional coordinators.

### **Need and Gap Analysis**

*Need:* We propose to provide you with the number of housing units needed by 2028 and will include the steps by which we arrive at the number. Our work will primarily focus on housing needed for the workforce, but will also consider housing for senior residents as well. Our need figures will be broken down into the catch up need (needed today) and the keep up need (demand forecast). The keep up

need will identify the number of new homes needed to accommodate new workers to fill new jobs and backfill current workers anticipated to retire in the next 5 years. Housing currently under construction or formally in the pipeline with a reasonable likelihood of being constructed by 2028, and targeted at prices that the local workforce can afford, will be accounted for. Homes being constructed and priced/marketed for second homeownership would not be counted as reducing the number of housing units needed to house the local workforce.

*Gap:* We will provide the distribution of household income by tenure, Area Median Income (AMI), and maximum sale price and gross rent. This will then be compared to prices and availability of rental and for sale housing to identify where there are gaps in the market (by income/AMI). Given a desire to consider the Town's older population, including seniors, we intend to look at household income by tenure and AMI for two age cohorts, those age 15 to 54 and 55+, which will allow us to highlight any relevant information to better address the housing needs of those in or near the prime age workforce and those nearing retirement or already retired.

We will specify the recommended number of housing units needed by tenure and AMI/price. In addition, we will identify undersupplied housing types. Based on our knowledge of the current housing stock, a more diversified housing inventory is needed.

#### **Barriers Analysis**

We propose to assess and report on items 3 and 4 under "Barriers Analysis" in the RFP as part of the HNA. Items 1 and 2 will be addressed in the Action Plan. This will include identifying the current cost of construction (land, soft and hard costs, infrastructure and fees). This analysis will be used to identify the capital gap - the difference between the cost to construct and what local households can afford. Typically we show this for a single family home, but can look at other housing types too. We intend to estimate the total amount of funding needed to close the capital gap through 2028 based on the catch-up and keep-up need. We anticipate providing the dollar amount as an estimated range to account for the many variables involved. Paonia could then use this alongside a forthcoming report being prepared for Region 10 by a consultant team that includes Urban Rural Continuum to gain additional insights regarding the economic impacts of housing construction.

Other market forces impeding the housing supply will be discussed, which could include topics such as the supply of skilled labor in the North Fork Valley.

Primary data sources not already listed: Colorado Housing and Finance Authority (CHFA) Income Limits, Ribbon Demographics, LLC, Zillow or similar online platform, and interviews with one or more local builders.

### **PHASE 1 DELIVERABLES**

1. Draft Housing Needs Assessment
2. Final Housing Needs Assessment, formatted as the Town desires, potentially in line with the Paonia in Motion Parks, Recreation and & Trails Master Plan

## PHASE 2: HOUSING ACTION PLAN

Our team will work with the Town, stakeholders, and community to facilitate the co-creation of a Housing Action Plan that incorporates the voice of the community in prioritizing and pursuing the types of housing that are needed and desired. Due to the schedule outlined for this project in the RFP, the Housing Action Plan will be completed mostly in parallel with the HNA. With a small consultant team, we can ensure the two phases will be coordinated and inform each other. The Action Plan will identify and prioritize recommendations for the Town and partners to take toward creating and encouraging affordable and workforce housing.

### Consultant Roles

Shay Coburn will lead the Action Plan with significant support from Andrew Coburn. Ayres will also support action planning through the development and detailing of strategies as well as assist in document and graphic creation, GIS mapping, and other specific needs as they arise.

### 1. DOCUMENT REVIEW AND BACKGROUND RESEARCH

Our team would dive right in to learn all about the Town through reviewing existing reports and resources including Town Board and Planning Commission meeting packets and minutes, Paonia In Motion, 1996 Comprehensive Plan, and others identified by Town staff. We will also review the Town's municipal code and other regulatory documents to uncover any barriers that may need to be addressed in the Action Plan like density allowances, housing sizes, parking regulations, processes, and much more.

### 2. HOUSING RESOURCES

Research all existing resources for housing applicable to the Town of Paonia, like any rehabilitation funds or vouchers through organizations like the Delta Housing Authority and/or the Area Agency on Aging through Region 10. Use this information to create a Housing Resources in Paonia brochure or flier that can be shared widely and is in a format that can be updated by the Town at any time. Some of the community engagement efforts may inform this step.

### 3. INITIAL LIST OF STRATEGIES

Compile a list of potential strategies to address housing in the Town of Paonia, including review of all DOLA Qualifying Strategies listed in HB21-1271. This list will likely be organized into the following categories: Incentives, Regulations, Partnerships, and Initiatives. This list will give us a place to start discussions with the community and will be refined throughout the project.

### 4. REFINE LIST OF STRATEGIES

The initial list of strategies will be refined through robust community engagement detailed elsewhere in this proposal. Strategies that are not applicable or unlikely to be effective at this time may be removed, new ideas may be added, and some of the strategies may be refined to fit the local context. We will also begin to identify priorities through a balanced approach that addresses the long term needs and desires of the community. For example, it is always good to identify some quick win projects that will keep the momentum going toward the larger goals.



## 5. DRAFT HOUSING ACTION PLAN

The Draft Action Plan will be developed based on all project research and community engagement combined with the specialized knowledge of our consulting team. It will be in a simple format so that changes can easily be made as needed. This draft plan will be reviewed by the Housing Committee and the Town Board. Based on feedback, the draft will be edited into the Final Action Plan.



## 6. FINAL HOUSING ACTION PLAN

The Final Action Plan will be detailed and thoughtful but also simple and clean. The Action Plan will be in an easy to read format that can be a living document used to track progress. The Action Plan will include detailed steps to specifically address the Town of Paonia's housing needs and desires. These actions will be prioritized with timeframes, strategies to implement or adopt suggested action steps, potential partners, and funding sources. As requested in the RFP, the following will be included in the Action Plan, along with additional strategies identified throughout the process:



- a. Recommendations on municipal code revisions to remove barriers and incentivize affordable housing. These recommendations will aim to include at least four of DOLA's Qualifying Strategies including addressing expedited review, ADUs, smaller residential units, and short-term rentals as prioritized by the Town Board at their regular September 22, 2022, meeting.



Optional Add On: First draft of proposed/revised code language for up to four of DOLA's qualifying strategies, assumed to be ADUs, Short Term Rentals, smaller unit size, and expedited review.

- b. A list of potential development sites, primarily public or institutional land, along with potential funding sources for acquisition and construction. Site identification was requested in the RFP to be included in the HNA, but we believe it is a better fit as part of the Action Plan.



Optional Add On: A detailed strategy for the development of an affordable housing project including site identification, potential partners, rough project design, range of units and programming mix, and potential financing.

- c. Steps to form a housing authority, if determined to be a priority strategy.
- d. GIS data and maps as appropriate to support the HNA and Action Plan.

## PHASE 2 DELIVERABLES

1. Housing Resources in Paonia flier
2. Draft Housing Action Plan
3. Final Housing Action Plan, formatted as the Town desires, potentially in line with the Paonia in Motion Parks, Recreation and & Trails Master Plan

### Town assistance desired to complete this project:

- Attend regular check in meetings with the consultants, perhaps every other week.
- Staff expertise to share local knowledge, known barriers, trends, opportunity sites, and other background information.
- Assistance forming the Housing Committee and contact information for key stakeholders.
- Scheduling, coordinating and all arrangements for Town Board meetings; assistance in setting dates and securing space for the Housing Committee meetings and Open House.
- Connection with local Realtor to assist obtaining MLS data.
- Provide historical data on number of building permits/Certificates of Occupancy per year, and residential development projects in the planning pipeline.
- Share existing GIS data relevant to this project.
- Provide data on known deed restricted properties or housing units in town.
- Add key information to the Town's website and post on the Town's Facebook using information provided by the consultant team.
- Review and consolidate feedback on draft documents.



## SCHEDULE

Our team is committed to completing the Housing Needs Assessment and Housing Action Plan so the Town Board can consider acceptance of the documents at the July 25th meeting. This schedule assumes the project start is March 20th as indicated in the RFP and that the Town can commit to this schedule.

	March		April				May					June				July			
Week	3	4	1	2	3	4	1	2	3	4	5	1	2	3	4	1	2	3	4
<b>Community Engagement</b>																			
Kick-Off with Town Staff	█																		
Form Housing Committee	█	█																	
Housing Committee Meeting 1			█																
Employer Questionnaire		█	█	█	█	█													
Realtor/Property Manager Focus Group or Interviews		█	█	█	█	█													
Housing Committee Meeting 2							█												
Community-wide Open House								█	█										
Targeted Outreach Materials							█	█	█	█									
Housing Committee Meeting 3											█								
Town Board Meeting June 13													█						
Housing Committee Meeting 4														█					
Town Board Meeting July 11																		█	
Town Board Meeting July 25																			█
<b>Phase 1: Housing Needs Assessment</b>																			
Document Review	█	█																	
Demographics and Economics			█	█	█														
Housing Inventory				█	█	█													
Housing Costs and Availability							█	█											
Development Analysis								█	█										
Housing Needs and Gaps									█	█									
Housing Issues and Challenges										█	█								
Draft Needs Assessment, submitted June 5											█	█							
Final Needs Assessment, submitted by July 20													█	█					█
<b>Phase 2: Housing Action Plan</b>																			
Document Review and Background Research	█	█	█																
Housing Resources	█	█	█																
Initial List of Strategies			█	█	█	█													
Refine List of Strategies							█	█	█	█									
Draft Action Plan, submitted July 6												█	█	█	█				
Final Action Plan, submitted by July 20																		█	█
OPTIONAL Add On: First draft of proposed code language																		█	█
OPTIONAL Add On: Detailed strategy for development of an affordable housing project																		█	█

The above schedule is tight and may result in less community participation and project buy-in. We believe extending the schedule by a month or two will allow for more effective community engagement, flexibility in meeting with vulnerable populations, and provide for more meaningful and in-depth conversations. With this extra time, we believe the Town will still be able to achieve its goals to submit a strong letter of intent to DOLA for the incentive grant program and coordinate with the comprehensive plan schedule. We'd welcome the chance to discuss this with you.

## QUALIFICATIONS

### TEAM OVERVIEW

#### URBAN RURAL CONTINUUM – PRIME CONTRACTOR

Urban Rural Continuum is a planning consulting firm located in the North Fork Valley just outside of Hotchkiss. The company works with public, non-profit and private-sector clients on a wide range of projects to facilitate positive change, with a particular focus on housing market analysis in rural and mountain communities.

Andrew Coburn is the principal of Urban Rural Continuum. He is a planner and analyst who cares deeply about housing and has extensive experience preparing housing needs assessments across Colorado. He has also led or assisted with data analysis and synthesis on market studies for private residential projects and environmental reviews inclusive of socioeconomic and environmental justice impact analysis. Prior to founding Urban Rural Continuum LLC, Mr. Coburn served as a project manager and community planner for the National Park Service where he worked on high-profile planning efforts across the country. Mr. Coburn holds a Master of Urban and Regional Planning and a Master of Public Administration from the University of Colorado at Denver. He also holds undergraduate degrees in economics and business administration.

Shay Coburn is a planner with public and private experience, primarily in Colorado. She is passionate about helping communities document and achieve their goals and brings strong communication and organization skills to every project. She recently completed an assignment as the Interim Community Development Director in Delta, Colorado, where she oversaw all aspects of planning and building in the city. Prior to Delta, she was the Town Planner in Ridgway, Colorado, where she was responsible for all planning and many other town projects. She previously worked at the Department of Local Affairs, where she ran the Colorado Main Street program, and at a land use consulting firm where she analyzed regulatory barriers to housing affordability, prepared comprehensive plans, and revised land use codes for communities in Colorado and across the country. Shay holds a Master of Urban and Regional Planning and an undergraduate degree in Environmental Design from the University of Colorado.



#### ANDREW COBURN

Principal  
Role: Needs Assessment lead, community engagement support, Action Plan Support



#### SHAY COBURN

Senior Planner  
Role: Project manager, community engagement lead, Action Plan lead, Needs Assessment support

## AYRES ASSOCIATES – SUBCONTRACTOR

Ayres Associates is a multidisciplinary firm with local offices in Fort Collins, CO and Cheyenne, WY. Ayres' Planning and Development Services division was founded by former public sector planners and professionals that recognized a missing link between private sector practice and public sector needs. The team is composed of former public sector professionals that work to build long-term relationships with community partners. With experiences rooted in public sector planning, their team of industry leaders strive to provide a creative and customized approach to a community's needs. Some of their services and specialty areas include: Housing and Economic Analysis, Zoning Code Updates, Technical Assistance, Comprehensive / Long-Range Planning, Community Planning / Urban Design, Brownfield / Infill Redevelopment Engagement and Meeting Facilitation, Downtown / Main Street Planning, Branding and Visioning, Grant Writing / Administration, and Process Improvement Facilitation.



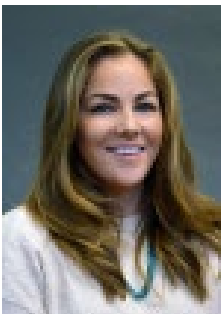
**JOSH OLHAVA, AICP, PCCP**

Senior Community Planner  
Role: Community engagement support, Action Plan support



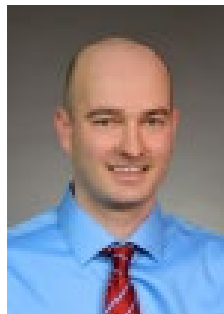
**MIKE SCHOLL, EDFP**

Economic Development Specialist  
Role: Needs Assessment support on development costs/capital gap, Housing Action Plan support



**LOGAN GRAVES, AICP**

Planner  
Role: Project support, document production, research and analysis



**AARON O'KEEFE**

GIS Specialist  
Role: GIS support



**MARK CHRISTENSEN, AICP**

Planner  
Role: Document production, graphics, research and analysis

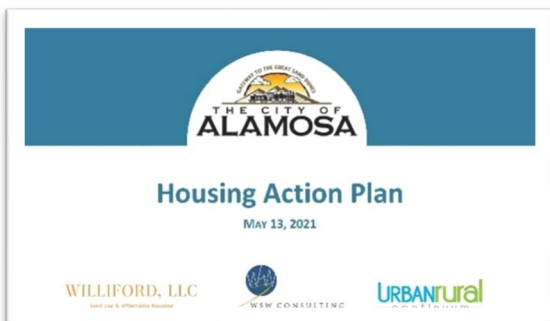
Full team resumes are attached as an appendix.

Both firms have ample capacity to complete the scope of work detailed in this proposal.

## SIMILAR PROJECT EXAMPLES

### URBAN RURAL CONTINUUM

#### ALAMOSA HOUSING NEEDS ASSESSMENT AND HOUSING ACTION PLAN



**Contact:** Deacon Aspinwall | Planning and Development Specialist, Development Services Department, City of Alamosa, CO | 719.589.6631 | daspinwall@ci.alamosa.co.us

**Status:** Completed 2021

**Consultant:** Andrew Coburn

**Summary:** URC was part of the consultant team that completed Alamosa's [Housing Needs Assessment](#) and [Housing Action Plan](#), and was integrally involved in both. This included demographic analysis, assessment of the housing inventory, building permits over time, the for sale market, and report preparation. He participated in committee and public workshops to identify and prioritize solutions and strategies, and assisted in action plan production. The City has actively used both documents since their completion. Hundreds of affordable housing units are in the planning pipeline, which the housing needs assessment and action plan helped inform and facilitate.

#### CRAIG HOUSING NEEDS ASSESSMENT



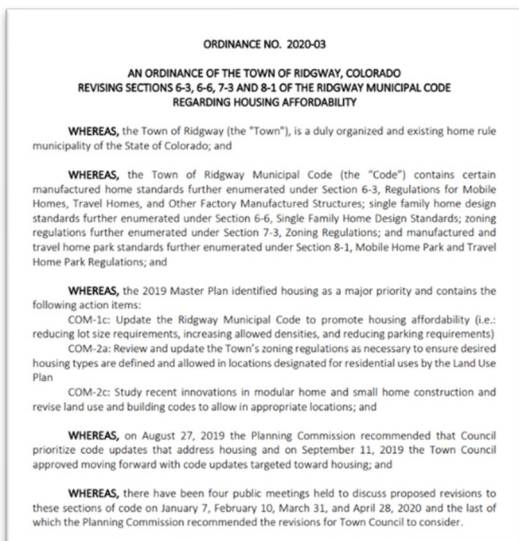
**Contact:** Shannon Scott | Economic Development Manager, City of Craig, CO | 970.826.2020 | sscott@cityofcraig.org

**Status:** Completed 2021

**Consultant:** Andrew Coburn

**Summary:** URC was part of the consultant team that completed a [Housing Needs Assessment](#) for Craig in 2021, a city actively planning the transition to an economy less dominated by fossil fuel extraction and energy production. The assessment identified a current need for about 75 additional housing units, which requires more than three times the historic rate of production. Andrew led the employer survey, data analysis and reporting, and identified the needs and gaps.

## RIDGWAY MASTER PLAN, AFFORDABLE HOUSING CODE UPDATES, OUTREACH



**Contact:** Jen Coates | previous Town Manager, Town of Ridgway | 970.729.1142 | coates.jennifer.a@gmail.com

**Status:** Completed 2020

**Consultant:** Shay Coburn

**Summary:** Shay led the creation of an updated [Master Plan](#) including a very detailed focus on housing. After the completion of the Master Plan, Shay led efforts to update the municipal code to remove barriers and provide incentives for affordable housing development. This included education and outreach, many public meetings and a lot of fine tuning to determine what would work for the citizens and the Town. The final code updates were adopted in 2020 and can be found in Ordinance No. 2020-03 (see page 32 of [this Town Council packet](#) for the detailed staff report and redline of the code, see page 30 of [this Town Council packet](#) for the Ordinance).

In addition, as the Town Planner, Shay worked on a number of additional affordable housing efforts like the creation of a flier of [Ouray County Housing Resources](#) and [promotion of ADUs](#).

## AYRES ASSOCIATES

### ESTES PARK HOUSING ASSESSMENT AND ZONING CODES



**Contact:** Jessica Garner | Community Development Director, Town of Estes Park, CO | 970.577.3720 | jgarner@estes.org

**Status:** Ongoing

**Consultant:** Josh Olhava and Mike Scholl

**Summary:** In this high-demand mountain community, Ayres is serving as on-call staff to help explore zoning code amendments targeted at adding missing middle options that are “mountain-town” appropriate. We are dovetailing our work with a 1271 Housing Assessment to provide code language that will enable short and long term solutions to advance.

Ayres, in conjunction with Multi Studio, Inc, has completed a diagnostic review of the zoning code which highlights key issues to address. We are drafting interim code options for the Planning Commission to review as the Town prepares for a more comprehensive update of their code. Ayres has already completed assistance with successful drafting and approval of a downtown building height increase, with an eye toward enabling workforce housing.

## CITY OF CRAIG HOUSING IMPLEMENTATION AND ZONING CODE UPDATE



**Contact:** Peter Brixius | City Manager, Craig, CO  
| 970.826.2023 | pbrixius@cityofcraig.org

**Status:** Ongoing

**Consultant:** Josh Olhava and Mike Scholl

**Summary:** Ayres is working collaboratively with the City to help meet the fast-changing conditions in Northwest Colorado. As the economy is repositioning itself, the City has identified a need for technical services to supplement the local staff team's expertise. Our team of experts provide assistance through a range of planning services, including planning and development applications, economic development and grant applications, parks and landscape design skills, and technical assistance with engineering and environmental assessments. Ayres assisted Craig build a development team and is moving forward with a 20 unit workforce (140% AMI) housing project. To date, the Ayres team has assisted with environmental remediation consulting; redevelopment analysis and development feasibility exploration of an infill site for housing; transportation analysis to facilitate neighborhood development; and grant writing assistance. Future project assistance could include zoning code revision.

## TOWN OF SEVERANCE HOUSING ASSESSMENT



**Contact:** Nicholas Wharton | Town Manager, Severance, CO | 970.685.9144 |  
nwharton@townofseverance.com

**Status:** Ongoing

**Consultant:** Josh Olhava and Mike Scholl

**Summary:** As part of our on-call contract, we provide a full range of planning support services including but not limited to technical development review, grant writing and administration, development and zoning code analysis and updates, long-range planning guidance, grant and funding strategies, a housing and economic assessment with recommendations, implementation strategies, and GIS mapping. Our team works closely with Town staff, appointed and elected officials, and resident groups to expand the knowledge base and role of planning within the community. Our team is looked to for expertise, problem-solving abilities, and creative solutions to help the community work toward their vision and goals.

To date, Ayres has written and helped the Town receive over \$1 million in grant funds for capital projects and specialty studies.



## REFERENCES

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### URBAN RURAL CONTINUUM

**Dawn Melgares**

Executive Director

San Luis Valley Housing Coalition

719.587.9807

dawn@slvhc.com

URC was part of the consultant team that prepared a housing needs assessment and action plan for the 6-county San Luis Valley and for 15 valley communities. The work was conducted from 2020 to 2022 and is available on [URC's website](#) and at [www.slvhc.com](http://www.slvhc.com).

**Andy Hill**

Director of the Community Development Office

Colorado Department of Local Affairs

303.864.7725

andy.hill@state.co.us

Andrew Coburn provides contract management consulting services and Shay Coburn was a previous employee as the Main Street Manager.

### AYRES ASSOCIATES

**Peter Brixius**

City Manager

City of Craig, CO

970.826.2023

pbrixius@cityofcraig.com

The Ayres team provides technical support to the community and are currently working with the City to develop a 20-unit workforce housing project.

**Nicholas Wharton**

Town Manager

Town of Severance, CO

970.685.9144

nwharton@townofseverance.com

See project profile for summary of work.

# APPENDIX - RESUMES



## ANDREW COBURN, Principal

Mr. Coburn is a planner and analyst whose practice is focused on housing markets and housing needs, primarily in Colorado. He brings a strong research and analytical skillset to every project, and has a diverse professional and personal background.

Prior to founding Urban Rural Continuum in 2016, Mr. Coburn served as a project manager and community planner for the National Park Service for almost a decade. He managed and wrote plans and studies for parks and national heritage areas across the country, often analyzing socioeconomic and environmental justice implications of proposed federal actions. His diverse experience also includes working as an assistant financial director for a gubernatorial campaign and a wildland firefighter on the Sawtooth National Forest.

He has volunteered for the Nanjing Urban Planning and Research Center in China, Cajas National Park in Ecuador, and Habitat for Humanity in Bolivia.

### Contact

andrew@urbanruralcontinuum.com  
720.464.5821  
www.urbanruralcontinuum.com

PO Box 904  
Hotchkiss, CO 81419

### Education

Master of Urban and Regional Planning  
University of Colorado Denver (2008)

Master of Public Administration  
University of Colorado Denver (2008)

Bachelor of Arts, Economics  
University of Montana Missoula (2000)

Bachelor of Science, Business  
Administration  
University of Montana Missoula (2000)

London School of Economics Real  
Estate Economics and Finance online  
certificate course (2021)

### Professional Memberships

Colorado Chapter, American Planning  
Association

### Selected Project Experience

Housing Needs Assessments, Updates, and Action Plans are available at [www.urbanruralcontinuum.com](http://www.urbanruralcontinuum.com)

- ⇒ HNA—Region 10, Colorado—including Delta County (in process)
- ⇒ HNA Update—Fraser Valley (Winter Park, Fraser, Granby), Colorado (2022)
- ⇒ HNA—Town of Hayden, Colorado (2022)
- ⇒ HNA Update—Chaffee County (Salida, Buena Vista, Poncha Springs) (2022)
- ⇒ HNA—Teton Region, Wyoming & Idaho (2021-2022)
- ⇒ HNA & Action Plans—San Luis Valley (+ 15 valley communities), Colorado (2020-2022)
- ⇒ HNA—Town of Craig, Colorado (2021)
- ⇒ HNA & Action Plan—City of Alamosa, Colorado (2020-2021)

#### Private Development Market Study/Analysis

- ⇒ Steamboat Springs, Colorado (2020-2021)
- ⇒ Eagle River Valley, Colorado (2019-2020)



### SHAY COBURN, Senior Planner

Ms. Coburn is a planner with public and private experience, primarily in Colorado. She is passionate about helping communities document and achieve their goals and brings strong communication and organizational skills to every project.

Ms. Coburn previously served as the Community Development Director for the City of Delta and as the Planner for the Town of Ridgway. In these roles, she managed the preparation of new comprehensive plans, spearheaded code updates, permitted small and large development projects, including the Ridgway 30-unit Space to Create affordable housing project and a 50-unit LIHTC project in Delta. Prior to working in local government she worked for the Colorado Department of Local Affairs managing the Colorado Main Street Program and helping revitalize historic downtowns. Ms. Coburn started her planning career at Clarion Associates where she analyzed regulatory barriers to affordable housing, reorganized and revised land use codes, and prepared comprehensive plans.

She has volunteered for post-hurricane Katrina disaster assistance in New Orleans, Cajas National Park in Ecuador, and Habitat for Humanity in Bolivia.

### Contact

shay@urbanruralcontinuum.com  
720.464.5821  
www.urbanruralcontinuum.com  
PO Box 904  
Hotchkiss, CO 81419

### Education

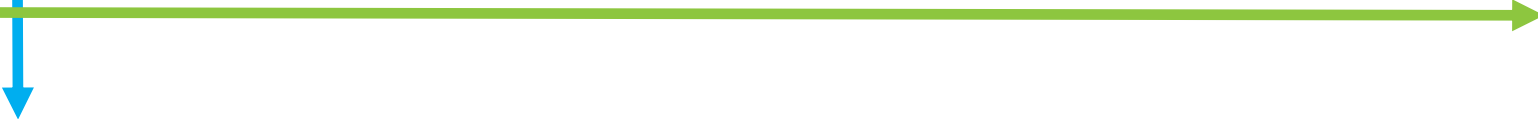
Master of Urban and Regional Planning  
University of Colorado Denver (2009)  
  
Bachelor of Environmental Design  
University of Colorado Boulder (2007)

### Professional Memberships

Colorado Chapter, American Planning Association

### Selected Project Experience

- ⇒ City of Delta, Comprehensive Plan: [Delta Unleashed](#) (2021)
- ⇒ Town of Ridgway (2017-2021)
  - Targeted code updates for affordable housing, Ordinance No. 2020-03: see page 32 of [this Town Council packet](#) for the detailed staff report and redline of the code, see page 30 of [this Town Council packet](#) for the ordinance
  - [Ouray County Housing Resources flier](#)
  - [ADU Outreach flier](#)
  - [2019 Master Plan](#)
- ⇒ State of Texas, [Analysis of State-Level Impediments to Fair Housing](#) (2013)
- ⇒ State of Idaho, County Impediments to Fair Housing (2012)





**Josh Olhava, AICP, PCCP**  
**Senior Community Planner**

With a strong background in community and strategic planning, Josh is well-versed in land use planning policies, procedures and regulations, including their impact on the built environment. His experience spans both public and private sectors to include policy and plan development – implementation, code analysis and amendments, development review, corridor analysis and design criteria and organizational process improvements. Josh is known for guiding creative and innovative planning initiatives with an eye on implementation. He enjoys bringing together community members and stakeholders to achieve common goals and objectives that embody community values.

**Total Experience**

11 years

**Education**

BS, Community and Regional Planning, Iowa State University

MS, Community Planning, University of Cincinnati

\*Work done under other employment.

**Select Experience**

- Housing Assessment, Policy Recommendations, and Code Updates, Eastern Plains, Montezuma County, Severance, CO
- Code Analysis and Amendments, Severance, CO
- Housing Code Update, Evans, CO
- Process Improvement, Larimer County, Broomfield, Windsor and Severance, CO
- Fee Study Analysis, Larimer County, Greeley, Estes Park, CO
- Code Assessment (Local PM) and Amendments, Broomfield, CO\*
- Design Guidelines and Code Amendments, Windsor, CO\*



**Mike Scholl, EDFP**  
**Economic Development and Housing**

Mike is highly regarded for his work in providing planning and economic implementation services. Mike served for over 15 years in local government providing support for special projects, economic development, and grant writing and supporting planning activities. He has worked on many special projects spanning economic and housing analysis, incentive packages, special district financing and grant initiatives.

**Total Experience**

28 Years

**Education**

BA, Political Science; MS, Public Policy; MS, Urban Planning, University of Michigan

**Select Experience**

- Housing Code Adjustments, Estes Park, CO
- Future of Housing, Craig, CO
- Housing Assessment, Policy Recommendations and Code Updates, Eastern Plains, Montezuma County, Severance, CO
- DOLA Recovery Roadmap, Various Municipalities, CO
- B1271 Affordable Housing Grant Implementation, Englewood, Evans, Severance & Eastern Colorado Roadmap Team District
- Maker Space Feasibility Study, Erie, CO
- Master Plan, Evans, CO
- Loveland ArtSpace Project, Loveland, CO (As City Staff)
- Laramie Main Street Alliance, Upper Story Housing Development, Laramie WY



**Logan Graves, AICP**  
**Public Engagement and Planning**

Logan previously served a municipality and a regional planning agency, including extensive work on neighborhood plans and revitalization projects. Her experience includes grant administration, brownfields revolving loan fund implementation, and zoning code reviews and amendments. She worked to streamline site plan and development approval processes.

Logan served as a case planner for variance and conditional use requests, annexations, and site plans. She enforced design regulations and applied flexibility when necessary to encourage adaptive reuse of existing structures.

**Total Experience**

10 years

**Education**

BA, Human Services, Western Washington University

MS, Community and Regional Planning, University of New Mexico

**Select Experience**

- Housing Code Adjustments, Estes Park, CO
- Housing Code Update, Evans, CO
- Housing Assessment, Policy Recommendations and Code Updates, Eastern Plains, Montezuma County, Severance, CO
- Unified Development Code, Greeley, CO
- HB 1271 Affordable Housing Grant Implementation, Englewood, CO
- Chuckwagon Motel Housing Case Study, Scottsbluff, NE



**Mark Christensen, AICP**  
**Code Development**

Mark started his career in Centennial as a planner, and most recently worked for 2.5 years for the City of Cheyenne, where he managed the City's Brownfield Revolving Loan Fund, contributed extensively to the creation of the Cheyenne Urban Renewal Authority, and led the West Edge rezoning effort.

Mark has extensive experience in local government planning, ranging from development review to bringing projects through City Council approvals. He has been involved with public engagement, open space planning, and comprehensive plan updates.

Mark is active in his community and recognized by his professional peers, including Wyoming Planning Association accolades as Planner of the Year in 2021 and honors for his involvement in the Planning Project of the Year in 2021 and 2019 – the Cheyenne Urban Renewal Authority and the Laramie North 4th Street Redevelopment Plan, respectively.

**Total Experience**

6 years

**Education**

MS, Urban and Regional Planning, University of Colorado-Denver

**Select Experience**

- Housing Assessment, Policy Recommendations and Code Updates, Eastern Plains, Montezuma County, Severance, CO
- Future of Housing, Craig, CO
- On-Call Planning Services, Greeley, Johnstown, Craig, Larimer County, CO
- Brownfield and Infill Redevelopment, multiple communities, CO and WY



**Aaron O'Keefe**  
**GIS Specialist**

Aaron provides mapping and GIS support to our engineers and planners. His experience includes the coordination of mapping efforts for projects such as outdoor recreation plans, bicycle and pedestrian plans, wayfinding signage plans, and traffic studies. Aaron develops GIS maps and databases that enable clients to layer different types of data on a geographic area. He strives to develop compelling and concise visualizations that enable clients to quickly and effectively discern complex information. Aaron is proficient in ArcGIS with Spatial Analyst, AutoCAD, M-Color, and Adobe products. Aaron also has prior experience in civil engineering and surveying and is proficient at preparing engineering and survey drawings, including site maps, profile drawings, and plat maps.

**Total Experience**

17 Years

**Education**

BA, Cartography/GIS, University of Wisconsin-Madison

AS, Civil Engineering Technology, Madison Area Technical College

**Select Experience**

- Park Master Plan and Aero Park Development, Menomonee Falls, WI
- Aquatics Feasibility Study, McFarland, WI
- UW-River Falls Campus Edge Improvements (DFD No. 19F2Z), River Falls, WI
- UW-Madison WARF Plaza Design, Madison, WI
- Aquatic Needs Assessment, Tempe, AZ
- Playground Renovations, West Allis, WI
- 39th Avenue Retention Basin Utilization Plan, Pleasant Prairie, WI



&



**Proposal for Town of Paonia**  
**Housing Needs Assessment & Housing Action Plan**  
**COST PROPOSAL**

February 8, 2023



# COST PROPOSAL

## HOURLY RATES

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### URBAN RURAL CONTINUUM

Andrew Coburn     \$140

Shay Coburn        \$140

### AYRES ASSOCIATES

Josh Olhava         \$155

Mike Scholl         \$180

Additional staff     \$120

## BUDGET

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The table below provides cost details by task for the three primary project components - Community Engagement, Phase 1: Housing Needs Assessment, and Phase 2: Housing Action Plan. The total cost for the three project components is \$70,150.

Two tasks are included as optional add-ons since they were not specifically requested in the RFP. This includes preparing a first draft of proposed code language to address DOLA's qualifying strategies, and a more detailed strategy for development of one affordable housing project. The cost for these is \$8,760. The total project budget inclusive of the two optional add-ons is \$78,910.

We believe the first optional add-on will provide a lot of added value since application for DOLA incentive grant funds is predicated on adoption of at least three qualifying strategies. The second will help the Town and partners better understand how to move forward in a strategic way to put affordable housing for locals on the ground at one location in Town.

Finally, we welcome additional discussions with the Town about the cost table/budget, if desired. There are ways to reduce the cost by adjusting assumptions or removing/reducing the intensity of certain tasks, but we believe the comprehensive cost table below is responsive to all the requested items in the RFP.

The share of the project to be completed by URC is estimated to be 75%, with Ayres completing 25%.

### Budget Table Notes

- Costs include all personnel time, equipment, data purchase, supplies, overhead expenses, and profit.
- URC travel to and from Paonia is free.

Community Engagement	Cost
Kick-off Call with Town Staff	\$560
Form Housing Committee	\$840
Housing Committee Meeting 1	\$980
Employer Questionnaire	\$4,200
Realtor/Property Manager Focus Group or Interviews	\$1,400
Housing Committee Meeting 2	\$980
Community-wide Open House	\$5,500
Targeted Outreach Meetings	\$2,100
Housing Committee Meeting 3	\$980
Town Board Meeting June 13	\$560
Housing Committee Meeting 4	\$2,010
Town Board Meeting July 11	\$1,200
Town Board Meeting July 25	\$920
<b>Community Engagement Total</b>	<b>\$22,230</b>
Phase 1: Housing Needs Assessment	Cost
Document Review	\$560
Demographics and Economics	\$2,800
Housing Inventory	\$2,520
Housing Costs and Availability	\$2,520
Development Analysis	\$4,800
Housing Needs and Gaps	\$2,100
Housing Issues and Challenges	\$1,120
Draft Needs Assessment	\$5,440
Final Needs Assessment	\$3,800
<b>Phase 1 Total</b>	<b>\$25,660</b>
Phase 2: Housing Action Plan	Cost
Document Review and Background Research	\$1,680
Housing Resources	\$1,960
Initial List of Strategies	\$3,630
Refine List of Strategies	\$3,190
Draft Action Plan	\$8,130
Final Action Plan	\$3,670
<b>Phase 2 Total</b>	<b>\$22,260</b>
OPTIONAL Add-On: First draft of proposed code language	\$6,580
OPTIONAL Add-On: Detailed strategy for development of one affordable housing project	\$2,180
Phase 2 Total (with Optional Add-Ons)	\$31,020
<b>PROJECT TOTAL</b>	<b>\$70,150</b>
Project Total (with Optional Add-Ons)	\$78,910