



FEE AND SCOPE PROPOSAL

UNCG Center for Housing and Community Studies

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Project Title: Town of Knightdale Housing Inclusive Growth and Housing Affordability Plan

Period of Performance: January 1, 2023, to December 31, 2023

Description of Project: The UNCG Center for Housing and Community Studies (CHCS) proposes to provide to the Town of Knightdale, North Carolina, professional services for the development of a comprehensive Inclusive Growth and Housing Affordability Plan (the Plan). The Plan will identify housing needs in the community, the resources available to meet those needs, and the gaps between the needs and resources, and will make recommendations for specific strategies that will result in inclusive growth within the Town of Knightdale while increasing housing options and affordability.

Scope of Services: The full proposal submitted by CHCS is set forth in its Proposal, dated September 19, 2022, and is incorporated herein by reference. The following services are to be performed:

Element 1: Market Analysis: We will conduct a detailed study of the economic, spatial, and socio-cultural indicators affecting the housing market. We will evaluate demographic and economic trends; review the condition and characteristics of each housing market segment; consider zoning, commuting, employment, infrastructure, and other factors influencing housing market conditions; and assess the special needs and circumstances of vulnerable populations.

Element 2: Needs and Gap Analysis. We will conduct research to learn what the housing needs in the community are, what resources are available to meet those needs, and if there are gaps, where are they and who suffers the most from the shortfall. This research is conducted through an innovative program of community engaged research activities including (a) engagement with an Advisory Committee broadly representative of Town residents geographically,

demographically, and by affiliation, and including nonprofit directors, business leaders, public administrators, housing advocates, and members of neighborhood associations; (b) Walk-around with neighborhood representatives to get acquainted with and inspect key Knightdale neighborhoods; (c) twenty to twenty-five key informant interviews with important stakeholders including community leaders, Town officials, planners, business executives, shop owners, bankers, educators, developers and experts in the history and geography of Knightdale and Wake County; (d) one or two community workshops open to the general public, where people can learn about the Plan process and discuss housing and community topics; (e) eight focus groups, or roundtable discussions, with neighborhood residents representing various geographic, socio-economic, age, racial and ethnic, and affiliation groups; (f) public opinion survey of Town residents seeking views and perspectives on housing and community issues; and (g) project website, where information about the study process can be communicated; news updates, findings and draft reports posted; focus group participants recruited; survey responses solicited; and comments and questions from Town residents received.

Element 3: Development of Housing Goals. We will assist the people of Knightdale to define their housing goals and develop a plan of action for affordable housing over three-, five- and ten-year time frames. Our goals framework will embody several important principles: one, housing production and rehabilitation resulting in an adequate supply of ownership and rental housing that is safe, healthy and affordable to people of all income levels, races, and ages, and suitable for their various needs; two, a Town featuring safe, livable and sustainable neighborhoods; three, a Town where all have access to housing opportunities without discrimination; and four, a Town committed to addressing housing precarity and preventing and ending homelessness.

Element 4: Development of Inclusive Growth Goals: The Plan will promote affordable housing and at the same time promote inclusion and growth across all sectors of community and economic development. We will address three inclusive growth components: one, our innovative community engagement plan will enlist stakeholders and residents to diagnose the current state of housing, inclusion and growth, and develop a vision for change; two, the interventions we recommend will take aim at specific gaps in equitable resource allocation, for example at racial disparities in home ownership and eviction; and three, our long-term housing goals and outcome metrics will implement structures for monitoring and sustaining inclusion initiatives.

Element 5: Barriers Analysis: We will explore barriers to inclusive growth and affordable housing development including cost of financing and shortfall in funding resources to support affordable housing; zoning provisions that limit density and housing type, including single-family districts and other restrictions on multi-family housing and development of accessory dwelling, duplex and other “missing middle” housing forms; cumbersome development approval procedures; policies, practices and procedures that intentionally or unintentionally restrict housing choice on the basis of race, gender, age or other protected class; cost of land and construction; scarcity of

developable land; lag in sewer, water, road and other infrastructure elements; neighborhood opposition to affordable housing development; regional forces beyond the control of any one town; and state and federal laws limiting local action.

Element 6: Policies, Strategies and Recommendations. We will develop a comprehensive Inclusive Growth and Housing Affordability Plan that will be made up of several components: description of study design and methodology; descriptive information about the Town's housing economy, market conditions, and demographic and socioeconomic trends; detailed findings of the affordable housing needs assessment and gap analysis; presentation of community input including survey findings and selected findings and quotations from interview, community workshop and roundtable discussion research; discussion of housing inventory and areas of focus; discussion of barriers to affordable housing development, including community opposition, impediments to fair housing, and financial and regulatory barriers; presentation of housing goals; presentation of program and policy recommendations addressing housing finance, housing types, zoning and regulatory changes, land acquisition, and urban design. The Plan will describe in detail a proposed course of action for inclusive growth and housing affordability in the Town of Knightdale over the short, medium, and long terms. We will consider the broadest possible range of policy and market solutions and propose an all-options-on-the-table approach.

Element 7: Policies and Strategies Evaluation. We will put in place procedures and metrics for evaluation of the effectiveness of the inclusive growth and housing affordability strategies emerging from this project. These systems will be able to track the Town's success in meeting numerical targets, but can also measure, through the same community-engaged qualitative research methods to be used to develop the Plan itself, the experience of Town stakeholders and residents over the coming years and changes in their quality of life.

Project Deliverables: Project deliverables will include the following:

(1) Interim Reports. We will report in writing from time to time during the study period the findings from our successive research phases. These findings will also be incorporated in summary form into the Affordable Housing Plan referred to in subparagraph (2) below, but the interim reports will present the data in substantially greater detail.

a. Market Analysis. This interim report will present information about the Knightdale housing market, with reference to demographic, socioeconomic, and geographic factors, home values and rent levels, proximity to services, and housing conditions. Expected delivery date: July-August 2023.

b. Key Informant Interviews. This interim report will present a narrative account of our interview findings, drawing out the key themes that emerge from our conversations with leaders, experts, and other stakeholders. The text will prominently feature illustrative direct quotations from those interviewed. Expected delivery date: June-July 2023.

c. **Focus Groups.** This interim report will present a narrative account of our findings from focus groups, roundtable discussions, and community workshops, drawing out the key themes that emerge from our conversations with town residents and neighborhood representatives. The text will prominently feature illustrative direct quotations from the participants in the events. Expected delivery date: September-October 2023.

d. **Public Opinion Survey.** This interim report will present narratively and graphically the results of our survey of town residents. Expected delivery date: September 2023.

e. **Affordable Housing Plan.** The Plan will be delivered in a concise, visually lively and inviting format suitable for housing experts and the general public alike. It will incorporate summaries of the interim report data, and additional information about housing needs and identification of gaps; housing goals selected by Knightdale stakeholders and residents; a plan for inclusive growth in Knightdale; analysis of barriers to affordable housing development; policies, strategies, and recommendations for affordable housing; and a plan for development of success metrics and tracking of short-, medium-, and long-term outcomes of the Plan process. Expected delivery date: December 2023.

Project Management and Staffing: The services will be performed by the Project Team designated by CHCS: (a) Bruce Rich, Director of CHCS, will have overall supervision of the work and will lead all phases of research and Plan development; (b) Meredith DiMattina, CHCS GIS Specialist, will be responsible for secondary data compilation, data analysis, data mapping and presentation; and website development; (c) Dr. Haiyang Su will be responsible for secondary data compilation, data analysis, survey design and survey data analysis; (d) Michael Pearson, Community Advocate, will be responsible for community engagement plan support, qualitative research, and data analysis; and (e) UNCG graduate assistants will support all phases of the project work.

A summary of roles and responsibilities is set forth here:

Work Phase	Rich	DiMattina	Su	Pearson
Meetings/Teleconferences	√	√	√	√
Background Research/Meta-Analysis	√	√	√	√
Focus Groups	√			√
Key Informant Interviews	√			√
Community engagement website		√		
Multi-Modal Public Opinion Survey	√		√	√
Market Segmentation, Statistical and GIS Analysis	√	√	√	
Geographic Information/Mapping	√	√	√	
Community Workshops	√	√		√
Report Writing	√	√		√
Other Technical Assistance	√	√		
Travel Time/Overnight work trips	√			√
Project Management & Admin	√			
Inclusive Growth and Affordable Housing Plan	√	√	√	√

Project Fee: The total fixed fee for this project is \$98,888. Labor dedicated to the project will total 1,508 person hours. The portion of the fee attributed to labor and fringe is \$60,645. Labor will be allocated to the respective elements of the scope of work as follows:

	Hours Dedicated	Labor Cost	Fringe	TOTAL Labor and Fringe	
Element 1: Market Analysis (including background research)	151	4,376	1,689	6,065	10%
Element 2: Needs and Gap Analysis	452	13,127	5,067	18,194	30%
Element 3: Development of Housing Goals	121	3,500	1,351	4,852	8%
Element 4: Development of Inclusive Growth Goals	121	3,500	1,351	4,852	8%
Element 5: Barriers Analysis	121	3,500	1,351	4,852	8%
Element 6: Policies, Strategies and Recommendations	452	13,127	5,067	18,194	30%
Element 7: Policies and Strategies Evaluation	90	2,625	1,013	3,639	6%
TOTAL	1,508	43,756	16,889	60,645	100%

Travel expense including meals: \$2,334.

Supplies and materials: \$765.

Transcription services: \$2,000.

Incentives for Focus Group participation: \$2,220.

Facilities and administrative costs at federally negotiated rate of 45.50%: \$30,924.