
REQUEST FOR PROPOSALS

THE LONG-TERM IMPACT OF HABITAT HOMEOWNERSHIP

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OVERVIEW

Habitat for Humanity of Metro Denver¹ is undertaking a large new development in the south part of the metro area, which will provide home ownership opportunities for 63 households. This represents a unique opportunity to examine the impact of a large-scale Habitat presence on both a community and the residents within it.

This new development will be a 63 unit townhome development in the city of Sheridan, Colorado. This for-sale development will target families with incomes ranging from 35 to 80% of Area Median Income. This project is important to Habitat because it furthers our mission of building and selling homes to hard-working people in need of decent and affordable housing. Habitat for Humanity of Metro Denver is part of a global, nonprofit housing organization that seeks to put God's love into action by building homes, communities and hope. Habitat was founded on the conviction that everyone deserves a simple, durable place to live in dignity and safety, and that decent shelter in decent communities should be a matter of conscience and action for all. Habitat for Humanity of Metro Denver has served more than 600 families throughout its 36-year history in Denver.

RESEARCH CONCEPT AND THIS RFP

This Request for Proposals (RFP) seeks the services of a researcher to design and initiate a long-term study of the surrounding community and a longitudinal study of the resident homeowners participating in Habitat for Humanity's homeownership programs. It is anticipated that this study will continue for up to 30 years.

The researcher will design, initiate, and execute the process in Year 1, and will train and transition internal Habitat staff in Year 2 so that Habitat staff can independently conduct the research by Year 3. At Habitat's discretion, the researcher may remain involved in Year 3 and beyond for discrete tasks such as methodological consulting, but the goal of this RFP is to develop the study in Year 1 and transition it in Year 2 so that Habitat staff can continue the study thereafter.

The research and all associated research tools and templates will be solely the property of Habitat for Humanity of Metro Denver, and will not be published, shared, quoted, or released without the written permission of Habitat for Humanity of Metro Denver.

Bidders may submit a proposal for any or all of the four elements, with the exception that no proposal will be considered if it addresses only Element 3. Each element should be priced separately, and discounts offered (where applicable) if the researcher is hired for more than one element.

¹ Throughout this document, any reference to "Habitat" or "Habitat for Humanity" is referring specifically to Habitat for Humanity of Metro Denver.

RESEARCH GOALS AND USES

Habitat's Board of Directors approved a 3-year strategic plan which includes significant emphasis on expanding our impact evaluation and understanding of our long-term impact. We aim to develop, resource and execute a roadmap for a longitudinal study, which measures the personal transformation that occurs after a family buys their Habitat home (i.e. educational achievement, job retention, financial sustainability, and health.) We also want to better understand the impact on the neighborhood where Habitat homes are concentrated (i.e. crime rates, property values, ratio of homeownership/rental properties, and overall quality of life.)

We believe that gathering this type of information will help determine our highest yield strategies, reinforce our core competencies, gain more attention and resources for our mission and allow us to promote local and national policies that reflect the need and appropriate solutions in the community.

WORK SCOPE

The research will have four primary components, each described in detail below:

- Element 1 - Measure and understand long-term changes in the surrounding community as a result of the Habitat for Humanity residents' presence.
- Element 2 - Understand (and measure where applicable) the impact of Habitat home ownership on the purchasers of the Habitat homes.
- Element 3 - Support the Habitat Metro Area Habitat Homeowner Survey.
- Element 4 - Understand (and measure where applicable) the impact of Habitat home ownership on the long-term life trajectories of the children of Habitat home owners.

ELEMENT 1 – CHANGES IN THE SURROUNDING COMMUNITY

The researcher will develop two documents regarding changes in the surrounding community. This community will be defined as the City of Sheridan, Colorado, as the default assumption. However, the researcher may propose another definition based on radius, Zip Codes, or other measures.

The first document will be a "Community Impact Report" that reports point-in-time attributes of the community's well-being, quality of life, and economy. Examples of such attributes may include measures as diverse as crime rates, income, property values, standardized test score in schools, teen pregnancy rates, community walkability, mobility, diversity, community pride, fiscal impacts, public assistance needs, health of the business community, or many other factors. (These are merely examples and are neither required nor all-inclusive.)

The researcher will provide in their proposal a list of elements to be gathered and reported, as well as a justification of how this list will accurately and comprehensively measure community well-being. The researcher should offer a plan about the general sources or methodologies through which data will be gathered. Items for analysis to be included in the report will be developed in concert with Habitat. Habitat must approve the final list of elements to be included for analysis.

The researcher will gather similar data for the State of Colorado, the Denver Metro Area, and three communities of similar size and attributes as of Year 1. It will not be necessary to identify the three communities in the proposal, as that identification will be involved in the work scope.

For budget reasons, it is anticipated that this phase will rely extensively upon secondary research. However, if primary research is desirable or necessary, the merits of such an approach will be considered. The work scope should describe methodologies and sample sizes.

The second document will be an instruction manual for completing the Community Impact Report. This document will contain all sources of information, and any methodologies for approaches that involve primary research. The Instruction Manual will contain sources, steps, and estimated time requirements to develop each attribute in the Community Impact Report. Training will be provided to Habitat as needed on the methodologies or necessary steps for completion of primary research.

Pricing for this element will include the following:

- Year 1 pricing will include the cost to develop the first annual Community Impact Report and the Instruction Manual. This report must be completed before the initiation of construction in the Fall of 2016, and measure the community prior to any impacts from the Habitat development.
- Year 2 pricing will include the cost of 12 hours of training or consultation for a Habitat Employee to reproduce the Community Impact Report, plus an hourly rate for consultation on potential questions that might arise beyond the 12 hours.

ELEMENT 2 – IMPACTS ON HOMEOWNERS

The researcher will develop two documents regarding impacts of Habitat ownership on homeowners in the new development. Homeowners are defined for this purpose as the adults who listed on the deed/mortgage documents.

As an important note, this population will include the following groups:

- Homeowners who arrive in the first cohort after construction is complete. The study will continue to track these homeowners even if they subsequently sell the home and leave the area.
- Homeowners who arrive after the first cohort as “replacements”. Again, the study will continue to track these homeowners even if they subsequently sell the home and leave the area.

The first document will be a “Homeowner Impact Report” that examines the impact of Habitat ownership on the homeowners. This report will examine the well-being of homeowners along all applicable dimensions. Examples may include measures as diverse as quality of life, financial stability and well-being, employment stability, goal-setting behavior, sense of security, standard of living, physical and mental health, upward mobility, resilience in the event of setbacks, and ability/willingness to meet familial and household obligations. (These are merely examples and are neither required nor all-inclusive.)

The researcher will provide in their proposal a list of elements to gathered and reported, as well as a justification in how this list will accurately and comprehensively measure well-being. The researcher should offer a plan about the general sources or methodologies through which data will be gathered, and samples sizes. Items for analysis to be included in the report will be developed in concert with Habitat. Habitat must approve the final list of elements to be included for analysis.

To support this effort, the researcher will have use of the Habitat for Humanity Metro Area Habitat Homeowner Survey, which will be an annual survey conducted among the (currently) 600 Habitat for Humanity residents throughout the metro area. The researcher will provide questions for this survey to support the research goals. While the survey has not been conducted to date, previous similar survey efforts have generally garnered response rates of up to 50 percent.

The researcher may propose other methodologies as well to augment the survey if deemed desirable.

The Metro Area Habitat Homeowner Survey will gather data for both homeowners in the new project (a concentrated Habitat development) as well as homeowners in other Habitat housing (dispersed individual housing throughout the metro area). The homeowners in dispersed housing will serve as a comparison group, and the researcher is free to propose other methodologies to define a true control group if deemed desirable. Any examination of other control groups will be priced separately, and may or may not be included in the final work scope if selected.

Note that the Metro Area Habitat Homeowner Survey may not be the only tool used. The researcher may also propose other methodologies. It may be assumed that Habitat staff will facilitate contact between the researcher and Habitat homeowners, including distribution of further surveys, invitations and introductions for interviews, and other measures. Habitat staff will not facilitate introductions or contacts with any populations other than Habitat homeowners. The proposal should state explicitly any assumptions of Habitat involvement or responsibility in the research process.

The second document will be an instruction manual for completing the Homeowner Impact Report. This document will contain all sources of information, and any methodologies for approaches that involve primary research. The Instruction Manual will contain sources, steps, and estimated time requirements to develop each attribute in the Homeowner Impact Report. Training will be provided to Habitat as needed on the methodologies or necessary steps for completion of primary research.

Pricing for this element will include the following:

- Year 1 pricing will include the cost to develop the first annual Homeowner Impact Report and the Instruction Manual. See additional details about the Metro Area Habitat Homeowner Survey below, and the researcher will price the Metro Area Habitat Homeowner Survey separately. Any study of an additional control group will also be priced

separately. Pricing will also include an allowance for consulting as needed on recruiting and retaining participants in the study. In Year 1, the research will be baseline research, so it will be imperative to capture data as soon as homeowners are identified (even if prior to move-in). Home sales are anticipated to begin in approximately the fourth quarter of 2016 and sales will be complete by 2019. However, families that will purchase the units will be identified beginning in January of 2016 and selection continuing on a rolling basis until final sales occur.

- Year 2 pricing will include the cost of training or consultation for a Habitat employee to reproduce the Homeowner Impact Report, including all work related to the Metro Area Habitat Homeowner Survey and the collection of data for other control groups.

ELEMENT 3 - METRO AREA HABITAT HOMEOWNER SURVEY REPORTING

The Metro Area Habitat Homeowner Survey will serve two purposes. First, it will serve the Longitudinal Research project as described in this Request for Proposals. Second, it will serve other Habitat for Humanity purposes, such as general market research on Habitat programs, customer satisfaction research, and other as-yet unforeseen needs.

For efficiency, the researcher will work with Habitat for Humanity to design and analyze the research to support all goals, with a division of labor as follows:

- The researcher will design the survey instrument in accordance with the goals, subject to approval by the Habitat project manager. The survey will be no longer than 20 minutes in length, and preferably shorter.
- The researcher will provide consulting and training on methodology, with the initial expectation that the survey will be conducted via mail or possibly in-home interviews.
- Habitat for Humanity will conduct the surveys and enter the data using a template designed by the researcher. Researchers will provide information in their proposal on the software of choice for data entry.
- The researcher will produce a report that summarizes metrowide results as meets the needs of Habitat for Humanity that are NOT related to the longitudinal study.
- The researcher will analyze and report the data as appropriate in the Homeowner Impact report and/or Childhood Impact report (described in Element 4).

Pricing for this element will include the following:

- Year 1 pricing will include all costs related to Metro Area Habitat Homeowner Survey, both supporting the longitudinal study and other Habitat for Humanity efforts. A metrowide report will be prepared, as well as including any relevant analyses in the Homeowner Impact Report and Children of Habitat report (see Element 4). Year 1 will also include the preparation of an Instruction Manual for the analysis of the survey, to the extent that such

training is desired. This survey will initially be conducted in 2016, but the full universe of homeowners in the study area is anticipated to be in place by 2018.

- Year 2 will include the cost of training a Habitat employee to reproduce/update both parts of the analysis.

While Habitat for Humanity of Metro Denver will accept proposals for any or all elements of the research individually or in combination, we will not accept proposals that address ONLY Element 3, since it will likely be integral to Elements 2 and/or 4.

ELEMENT 4 – IMPACTS ON CHILDREN OF HOMEOWNERS

The researcher will develop three documents regarding impacts of Habitat ownership on the children of homeowners in the new development.² As an important note, this population will include the following groups:

- Children of homeowners who arrive in the first cohort after construction. The study will continue to track these children even if their parents or guardians subsequently sell the home and leave the area.
- Children of homeowners who arrive after the first cohort as “replacements”. Again, the study will continue to track these children even if their parents or guardians subsequently sell the home and leave the area.

As a longitudinal study, it is planned that the study will continue track these children into adulthood. Once a person is identified as a “Child of Habitat”, they will forever have that designation for research purposes.

The first document will be a “Children of Habitat” Report that examines the impact of Habitat ownership on the children of homeowners. This report will examine the well-being of children along all applicable dimensions. Examples may include measures as school performance, happiness, resilience to setbacks, respect for law and society, public assistance needs as an adult, high school graduation rates, idle or productive at age 20, appreciation of the world around them, feelings of security, and ability/willingness to plan for the future. (These are merely examples and are neither required nor all-inclusive.) Items for analysis to be included in the report will be developed in concert with Habitat. Habitat must approve the final list of elements to be included for analysis.

Recognizing that this study will stretch from infancy to adulthood, the dimensions should reflect that range, and will likely include different elements for different ages.

The researcher will provide in their proposal a list of elements to gathered and reported for different age groups, as well as a justification in how this list will accurately and comprehensively measure well-being. The researcher should offer a plan about the general sources or methodologies through which

² The term “children” refers to minors living in the household. These could include biological children, grandchildren, foster children, adopted children, or others. Essentially, the term should be read to include any people under the age of 18 at the time of move-in.

data will be gathered, and sample sizes. It will not be necessary in the proposal to describe the transition of the research measures and methodologies for these children beyond the age of 18, since that will be part of the work scope for the selected researcher.

To support this effort, the researcher will have use of the Habitat for Humanity Metro Area Habitat Homeowner Survey, as discussed above, recognizing that the Survey is currently planned to be administered to homeowners only (and not their children). The researcher may propose other methodologies as well to augment the survey if deemed desirable. The proposal should discuss how data will be gathered – from parents, from the children themselves, or via other sources.

The children of homeowners in dispersed housing could possibly serve as a comparison group to the extent that the Metro Area Habitat Homeowner Survey asks questions along those lines, and the researcher is free to propose other methodologies to define a true control group. Any examination of other control groups will be priced separately, and may or may not be included in the final work scope if selected.

The second document will be an instruction manual for completing the Children of Habitat report. This document will contain all sources of information, and any methodologies for approaches that involve primary research. The Instruction Manual will contain sources, steps, and estimated time requirements to develop each attribute in the Children of Habitat Report. Training will be provided to Habitat as needed on the methodologies or necessary steps for completion of primary research.

The third document will be a concept and planning paper describing how the research measures will transition as children age into adulthood. How will the measures change as a “Child of Habitat” transitions to adulthood? How will the research approach evolve as Children of Habitat age from infancy to childhood to teen to adult?

Pricing for this element will include the following:

- Year 1 pricing will include the cost to develop the first annual Children of Habitat Report, the Instruction Manual, and the Concept Paper for transition to adulthood. Pricing will also include an allowance for consulting as needed on recruiting and retaining participants in the study. Recognize that the study may require different elements of well-being for children of different ages. In Year 1, the research will be baseline research, so it will be imperative to capture data as soon as children are identified (even if prior to move-in). Home sales are anticipated to begin in approximately the fourth quarter of 2016 and sales will be complete by 2019. However, families that will purchase the units will be identified beginning in January of 2016 and selection continuing on a rolling basis until final sales occur.
- Year 2 pricing will include the cost of training or consultation for a Habitat Employee to reproduce Children of Habitat Report, including all work related to the Metro Area Habitat Homeowner Survey and the collection of data for other control groups.

PROPOSAL FORMAT

The proposal should be organized in the following manner within the following page limits. Any text beyond the prescribed page limits will be ignored.

CONTACT INFORMATION (1 PAGE)

Provide contact information for three individuals, including physical address, phone, mobile phone/text, and e-mail. (the same person can be involved in more than one role).

- The proposed technical project manager (the person who will manage the work)
- The proposed business manager (the person who will hand discussions about issues such as contract negotiations, budgets, and work scope changes)
- Contact information for the person who will coordinate invoicing and other administrative functions

EXECUTIVE SUMMARY (1 PAGE)

The researcher will provide an executive summary of their approach and research objectives.

INTRODUCTION (3 PAGES)

Provide an introduction of your organization, including the following information:

- History of the firm – when was it founded, and by whom
- Legal status – C corporation, S corporation, 501c3, etc.
- Leadership – who are the senior leaders in the firm, and what is their role and expertise?
- Primary markets and/or areas of expertise
- Evolution of the firm – what markets are more prominent now than in the organization's early days?

PROJECT TEAM (2 PAGES PER TEAM MEMBER)

Provide an introduction of your proposed project team. Provide no more than two pages for each team member, in the following format for each member. As a single exception, you may provide up to three pages for the proposed technical project manager.

- Name and job title (and company, if the person is a subcontractor)

- Organizational status of person: full-time, part-time, seasonal, intern, student worker, temporary, subcontractor, etc. Do not list someone as an employee unless you pay unemployment and social security employer taxes on that person. Habitat reserves the right to confirm employment status and history.
- Normal hourly billing rate
- Their expected roles and responsibilities on this project.
- Start date at your company (year is sufficient, no need for month and day).
- Previous relevant experience (list employer, job title, and dates of employment)
- Educational history (degrees, certificates, etc.)
- Three previous relevant project case studies for that team member, highlighting
 - Over view of the project – goals and methodology
 - Project budget
 - Percent of the project for which this person was responsible (estimates are sufficient)
 - What tasks did that person perform on the project? Habitat reserves the right to contact the client to confirm the person’s role and contribution.
 - How are those tasks relevant to this project?

ORGANIZATIONAL OVERVIEW (2 PAGES)

Provide the following information:

- An organizational chart that shows every person in your organization by hierarchy, showing the start date (by year) for every person.
- State the number of interns employed by your organization in the past three years, and the number of student workers or other temporary or seasonal staff.
- Provide your total organization revenues for 2012, 2013, 2014, and January through June of 2015.
- State your limits of professional liability and business liability insurance. Habitat will request insurance documentation, and at its discretion may require being added as an insured or increasing insurance amounts.
- Any relevant awards or other information may be included in this section, within the two page limit.

WORK SCOPE DESCRIPTION (8 PAGES)

In the first paragraph, state your intention about which of the four elements your proposal is pursuing.

In the subsequent pages, document your approach to each pursued element according to the instructions set forth in the Scope of Work section of this RFP. Explicitly state the roles and responsibilities of Habitat staff in each element of the research.

RISK ASSESSMENT (2 PAGES)

What are the greatest risks on this project in Year 1, Year 2, and the long term? Provide a short writeup of how you have addressed and mitigated these risks on other engagements. Provide specific examples of projects.

BUDGET (4 PAGES)

State whether this is a fixed-price budget or whether this is an estimate.

For each of the following elements, provide pricing in the following format:

	Year 1	Year 2
Element 1 – Community Impact	<p>Preparation of Community Impact Report: separate breakouts for the cost of secondary research and any primary research proposed.</p> <p>Preparation of Instruction Manual for Year 2 transition.</p>	<p>Cost of 12 hours of consulting/training for a Habitat employee to reproduce/update the Community Impact Report, and hourly rate for any consulting/training beyond that amount.</p>
Element 2 – Homeowner Impact	<p>Preparation of Homeowner Impact Report: separate breakouts for the cost of studying homeowners and the cost of any control group.</p> <p>Preparation of Instruction Manual for Year 2 transition.</p> <p>Research involving the Metro Area Habitat Homeowner Survey will not be included in this budget.</p>	<p>Cost of training a Habitat employee to reproduce/update the Homeowner Impact Report.</p>
Element 3 – Metro Area Habitat Homeowner Survey	<p>Preparation of Metro Area Habitat Homeowner Survey report for general use by Habitat, and any analysis/reports for</p>	<p>Cost of training a Habitat employee to reproduce/update the Metro Area Habitat Homeowner Survey Report and</p>

	<p>Elements 2 and 4.</p> <p>Preparation of Instruction Manual for Year 2 transition.</p>	<p>any analysis/reporting for Elements 2 and 4.</p>
<p>Element 4 – Children of Habitat Report</p>	<p>Preparation of Children of Habitat Report: separate breakouts for the cost of studying children and the cost of any control group.</p> <p>Preparation of Instruction Manual for Year 2 transition.</p> <p>Research involving the Metro Area Habitat Homeowner Survey will not be included in this budget.</p>	<p>Cost of training a Habitat employee to reproduce/update the Children of Habitat Report.</p>

TIMELINE (1 PAGE)

Include a description of the project timeline.

SELECTION CRITERIA

The proposals will be evaluated and the contract will be awarded to the researcher who provides the best combination of rigor, defensibility, and cost, in the opinion of the selection committee and any outside counsel retained for the purpose of evaluating proposals.

Habitat reserves the right to request interviews if desired.

Habitat is not responsible for any costs incurred in the preparation of proposals or the conduct of interviews.

PROPOSAL SUBMISSION

Proposals will be submitted electronically to Beth Truby of Habitat for Humanity of Metro Denver. Proposals should be submitted in MS Word or pdf to btruby@habitatmetrodenver.org by the date shown below.

Questions about the RFP may be submitted in writing to the same e-mail address, and must be submitted by the date shown below. All questions will be answered in writing in a single document that is available to all proposing researchers who notify Ms. Truby of their intent to propose. Any information obtained through any source other than this RFP and the Q&A response document is not guaranteed to be accurate.

The anticipated timeline of the proposal process will be as follows. All dates are subject to change as deemed necessary by Habitat.

Process	Date
RFP issued	September 15, 2015
Researchers provide intent to propose, in order to be included on Q&A distribution. It is not required to provide this intent to submit a proposal, but proposers are strongly encouraged to submit a notice of intent to facilitate receipt of subsequent communications from Habitat.	September 30, 2015
Questions due from proposing researchers. It is encouraged that questions be submitted as early as possible.	October 7, 2015
Responses to questions available from Habitat. Responses to all questions will be provided in writing to any researchers who provide a written intent to propose by the date shown in this RFP. If researchers do not receive written responses by the date shown at right, it is their responsibility to request a response from Habitat.	October 9, 2015
Proposals Due	No later than 5:00 p.m., Mountain Time, October 15, 2015.
Invitations to interviews for finalists (if deemed necessary by Habitat), and non-finalists notified of process termination.	October 22, 2015
Interviews with finalists (if deemed necessary by Habitat)	Week of October 26, 2015
Selection of researcher	November 1, 2015
Contract execution	November 15, 2015