

REVISED SCOPE FOR NORWALK AFFORDABLE HOUSING PLAN

2/16/2023

PHASE 1: PROJECT KICKOFF (AKRF & KDLLC)

Task 1.1: Assign Diverse Leadership for Planning Effort

Task 1.2: Establish Communication Strategy

Task 1.3: Formalize Inclusive Community Participation Plan

Task 1.4: Prepare Data Collection and Analysis Plan

Task 1.5: Kickoff Meeting with Internal Team & Committee

PHASE 2: DOCUMENTATION OF HOUSING PROGRAM & POLICY CONTEXT (AKRF)

Task 2.1: Summarize Local History and Context of Affordable Housing

Task 2.2: Summarize Existing Programs and Policies

PHASE 3: HOUSING NEEDS ASSESSMENT (KDLLC)

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Task 4.2: Identify Existing Programs, Policies, and Housing Types that will Continue

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PHASE 5: PLAN ADOPTION (AKRF)

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Task 5.3: Compile and Transfer Data

Task 5.4: Draft Zoning Text and Regulatory Changes

PHASE 1: PROJECT KICKOFF (AKRF & KDLLC)

Task 1.1: Assign Diverse Leadership for Planning Effort

- Establish inclusive internal project team
- Create diverse Affordable Housing Committee

Task 1.2: Establish Communication Strategy

- Create a website
- Develop social media marketing strategy
- Define strategies for maximizing inclusion for both needs assessment process and also for action/implementation planning

Task 1.3: Formalize Inclusive Community Participation Plan

- Document barriers to reaching diverse audiences and identify strategies for overcoming barriers
- Define general contents of housing needs survey
- Identify individuals & groups for stakeholder interviews, roundtable conversations, committee attendance, and live meetings
- Prepare schedule for needs assessment outreach events and for action/implementation planning outreach events

Task 1.4: Prepare Data Collection and Analysis Plan

- Prepare list of all available data with year, source, and contents
- Undertake spatial analysis showing the various ways geographic units that could be analyzed
- Identify data to be requested from city, county, state, real estate brokerages, and nonprofit organizations
- Describe strategies for overcoming data gaps for underrepresented communities

Task 1.5: Kickoff Meeting with Internal Team & Committee

- Present final scope including communicating strategy & inclusive community participation plan
- Invite community leaders to present affordable housing history
- Identify core values for planning effort including equity & inclusion

PHASE 2: DOCUMENTATION OF HOUSING PROGRAM & POLICY CONTEXT (AKRF)

Task 2.1: Summarize Local History and Context of Affordable Housing

Task 2.2: Summarize Existing Programs and Policies

- Comprehensive Plan Housing Element
- Zoning Code
- Fair Housing Laws
- Compliance with CGS 8-2
- Inclusionary Housing
- Norwalk Accessory Dwelling Unit Ordinance
- Norwalk Workforce Housing program
- Norwalk TOD Study

- AHP Guidance

PHASE 3: HOUSING NEEDS ASSESSMENT (KDLLC)

Task 3.1: Analyze Local, Regional, and State Data on Demographics and Housing

- Conduct Comprehensive Demographic & Household Analysis (Population, Race, Gender, Language, Income). Sources will include US Census American Community Survey and United Way ALICE Report.
- Inventory Housing Supply (including all available metrics for both market and affordable units).
- Analyze Housing Gaps (including both market and affordable units)
 - Examine Cost Burden Levels
 - Use HUD Comprehensive Housing Affordability Strategy Tool
 - Document waiting lists for affordable housing units
 - Present gaps identified in other housing needs assessments (Urban Institute, CHFA, OCA)

Task 3.2: Conduct Market Analysis

- Compile and analyze data on housing rents and sales for all relevant geographic units for both market and affordable units.
- Interview brokers and property managers about current market conditions.

Task 3.3: Engage Community in Housing Needs Assessment

- Conduct Stakeholder Interviews.
- Convene Roundtable Conversations.
- Conduct Online Survey. Survey will be circulated to a wide variety of stakeholder groups.
- Coordinate pop-up events aimed at maximizing participation in survey with Committee members and other volunteers.
- Host Housing Needs Webinar and in-person Housing Needs Community Forum
 - Present preliminary findings from housing needs assessment including results from data analysis, stakeholder outreach, and survey results gathered to date
 - Invite community to identify or prioritize additional needs and/or complete the survey
 - Provide community with education on the ways in which an AHP provides a pathway for meeting housing needs by articulating Housing Values, Goals, Objectives, and Actions
- Prepare Record of Community Engagement that documents diverse stakeholders included within the process and memorializes the findings from each outreach event.

Task 3.4: Finalize Housing Needs Report

- Integrate quantitative and qualitative findings into one integrated Housing Needs Report.
- Evaluate how existing housing policies or programs may or may not be meeting the housing needs identified through the HNA.
- Identify potential value propositions that would be responsive to the range of needs revealed by the assessment.
- Publish Housing Needs Report as a community tool for engaging in action and implementation planning.

PHASE 4: ACTION AND IMPLEMENTATION PLANNING (AKRF)

Task 4.1: Define Values, Goals and Objectives with Community Input

- Prepare Draft Values, Goals, and Objectives based upon the findings from the Community Needs Assessment.
- Present Draft Values, Goals, and Objective to Committee and Public.
- Specify alignment of local and regional goals.
- Ensure goals include provisions for equity, inclusion, and access.
- Outline recommendations, timelines, and responsible parties for implementation.
- Finalize Values, Goals, and Objectives

Task 4.2: Identify Existing Programs, Policies, and Housing Types that will Continue

Task 4.3: Establish Action & Implementation Plan with Community Input

- Define strategic actions for short, medium, and long-term for ALL kinds of housing units including market, missing-middle, mixed-income, affordable units, and naturally affordable units.
- Connect Actions to Goals.
- Include numeric targets (ranges) but emphasize the location, type, rationale, and impact (benefits) of different housing production goals for specific parts of the City.
- Identify responsible parties for implementing actions.
- Outline process for performance tracking.
- Define land use and zoning changes, such as:
 - Addressing conflicts with CGS 8-2
 - Updating density regulations
 - Revising overly restrictive design or conversion regulations
 - Facilitating transit oriented development
 - Facilitating housing for elderly, disabled, and lowest income tiers
- Provide conceptual site-specific recommendations (including for municipally owned land)
 - *Scope does not include conceptual site plans. Concept plans could be provided for an additional fee.*
- Identify funding options.
- Address production & preservation Incentives.
- Provide actions that specifically address equity and inclusion.
- Review Draft Action Plan with Committee & Community (one in-person meeting).
- Revise Draft Plan based upon input from Committee & Community (one round of review and edits).
- Action Plan will include recommendations, timelines, and identify responsible parties for implementation.

Task 4.4: Assess the Impacts and Benefits of Proposed Actions

- Provide top-level assessment of the impacts that various actions would have on meeting community needs/goals; regional housing needs; infrastructure and services; fiscal flows.
 - *Does not include detailed modelling; focus is simply on highlighting the comparative risk/reward of various actions.*

- *Assumes that City of Norwalk GIS Department will be able to provide conceptual build-out information based on parameters provided by AKRF.*

PHASE 5: PLAN ADOPTION (AKRF)

Task 5.1: Finalize Deliverables

- Draft AHAP for referral to the Planning and Zoning Commission, Common Council.
- Revisions to Draft AHAP based on comments from Planning and Zoning Commission, Common Council (one round of review and edits).
- Assist with filing copy of Draft AHAP with City Clerk’s office and posting web-based version of Draft AHAP on City’s website (35 days in advance of the Common Council public hearing).
- Preparation of presentation materials for the public hearing.
- Final AHAP for filing/postings (includes one round of review and edits based on public hearing)

Task 5.2: Prepare Guidebook to Affordable Housing Plan in Norwalk

- Completion of a “Guidebook to Affordable Housing in Norwalk” for use by residents and government officials, which would be based on the final AHAP.
- Guidebook is envisioned as a PDF document that can be posted to the City’s website.

Task 5.3: Compile and Transfer Data

- All of the data utilized to complete the AHAP, including the baseline Housing Needs Assessment, development scenario(s), etc. would be made available as Word, Excel, and/or PDF documents.

Task 5.4: Draft Zoning Text and Regulatory Changes

- Provide recommended zoning and regulatory changes, including conceptual text recommendations to the zoning code.
 - *Scope does not include the preparation of “adoption ready” zoning text amendments or guiding the zoning text amendments through the approvals process.*

BUDGET

Phase/Task	Hours	Budget
Phase 1: Project Kickoff	55	\$9,862
Phase 2: Documentation of Housing Program & Policy Context	48	\$7,366
Phase 3: Housing Needs Assessment	228	\$43,493
Phase 4: Action and Implementation Planning	224	\$35,489
Phase 5: Plan Adoption	155	\$24,014
TOTAL	710	\$120,226
NOTES:		
1. Does not include contingency budget. 2. Assumes all GIS work would be provided by the City of Norwalk. 3. All community engagement workshops and public hearings will be held in-person. 4. Some meetings with Planning/Zoning Department and Steering Committee will be conducted 5. virtually. 6. Working draft distributed to the Planning/Zoning Department and Steering Committee members via email or digital platform.		

7. Planning/Zoning Department and Steering Committee members would have one round of preliminary review and one round of final review of draft Plan.
8. Includes 1 digital copy of the final AHAP and 25 bound hard color copies of the AHAP.
9. All other direct expenses (e.g., printing, mailing, and mileage) will be billed at cost.