



denver

1981 Blake Street
Denver, CO 80202

303.297.chfa (2432)
800.877.chfa (2432)

PO Box 60
Denver, CO 80201

800.659.2656 tdd
www.chfainfo.com

western slope

348 Main Street
Grand Junction, CO 81501

970.241.2341
800.877.8450

Response to Questions

REQUEST FOR PROPOSAL

Multifamily Voice of Customer Research

Response to Questions

1. Your LIHTC Property List is available on your website. For estimating the level of effort/cost for data collection purposes, what is the universe of properties to be considered for the stratified sample? For example, will some properties on that list be excluded or are there other properties that will be included? In terms of stratification, the list includes # of units, unit size/mix, property location, and population (Family, Senior, Special Needs), however age of the property isn't included. Will age of property, as a proxy for condition, be something you want to consider in stratification. If so, can that be provided?

We would like representation from older and newer properties. Approximately half of our LIHTC properties have placed in service since 2008.

We want to make sure that rural and urban geographies are represented.

2. To what extent does CHFA want to include stakeholder (resident, developer, etc.) engagement in providing input into the design of this survey process or implementation of the survey? For example, will CHFA lead any engagement, expect Vendor guidance and recommendations, or expect that the Vendor will lead engagement of stakeholders in 1) providing input into the content of the survey? 2) providing outreach to help engage residents in the survey process? and/or 3) assist in coordinating distribution of surveys or conducting special events in common areas for residents to encourage completion of surveys?

We are interested in stakeholder engagement, specifically resident engagement. Properties frequently have service coordinators or social workers, and often there are resident councils at the properties. We are interested in obtaining resident engagement with the help of the service coordinators, social workers and resident councils. We would like the Vendor to collaborate with CHFA regarding stakeholder engagement for survey content, process and distribution (1, 2 and 3, above).

3. The RFP lists a number of questions that cover rich research domains. Does CHFA expect to have all of these domains addressed in the survey or will this be determined in the survey design process? Is there already any prioritization of the research questions or, for example, are there key questions to be answered across the entire sample to be drawn and other questions more relevant for a subset of types of properties/populations?

The RFP covers examples of the research domains, and we will determine specific content during the survey design process in collaboration with the Vendor. The main research focus is “are the properties and communities meeting the needs of the residents?”

4. The RFP states the Anticipated Decision Date as the end of May. Is there an anticipated contract start date and a desired project duration/completion timeframe?

We anticipate the contract process between CHFA and the selected vendor to be complete within 30 days. We have flexibility to work with the vendor on a specific starting date, and we would like the survey portion of the project to be complete by the beginning of Q4 2021.

5. Your RFP outlines that the Vendor is expected to provide a survey platform and a method for collecting responses from residents who do not have access to technology. Does CHFA have a sense of the number of or percentage of residents who do not have access to technology?

We do not have a specific number. Residents generally have access to a Smartphone. Some property sites have computer access. We anticipate the percentage of residents who do not have access to technology to be less than 10% of the population.

6. Can you expand on the intent of this research, in terms of how you intend to use the information? How do you anticipate the findings will impact your work?

CHFA’s mission, vision, value proposition, brand statement, and values may be found at <https://www.chfainfo.com/about/Pages/history.aspx>

Our customer value proposition is the following: “We build trusted relationships with our customers to understand and deliver the products and services they need”.

This project aligns with our objectives, Engage Community and Advance Housing and Economic Development Solutions, in our 2021 Strategic Plan.

We would like to understand the needs of residents of affordable housing, and we would like to ensure our investment in affordable housing is helping advance quality of life for all residents. We intend to use the information to address any gaps that may be found. We expect the findings to inform our work in all our programs, affordable rental housing, affordable homeownership, and economic development. Possible outcomes may include improvements to CHFA’s products and services.

7. Why is this data project commencing now? When did CHFA last complete a similar data collection project? Are results of that last collection process available for review by interested vendors?

This work is part of CHFA’s 2021 Strategic Plan as Voice of the Customer research. CHFA has not completed this type of data collection process for our multifamily residents in the past. In the past, we have had focus groups with Colorado LatinX renters, and as a result of those focus groups, we created a microsite <https://www.chfainfo.com/mi-hogar/Pages/pasos-vivienda.aspx> and Spanish language videos about the homebuying process.

8. The RFP indicates that the team is seeking a partner with dedication to diversity, equity, and inclusion. Can you please share how you intend for this work to move the principles of equity, diversity, and inclusion forward with the Colorado Housing and Finance Authority?

With respect to its programs, services, activities, and employment practices, Colorado Housing and Finance Authority does not discriminate on the basis of race, color, religion, sex, age, national origin, disability, or any other protected classification under federal, state, or local law.

Among CHFA's corporate values are diversity, inclusion and equity. We intend for this research to help CHFA better understand the diverse needs of residents and how CHFA may advance its practices and programs based on that greater understanding. Likewise, we seek to understand if there are systematic inequities or gaps in the marketplace that we are currently unaware of so that we can take appropriate action to bridge those needs

9. The RFP notes that "this research may address the following" and includes six topic areas. We are curious if there are any specific questions already determined by CHFA, and if so, how many are determined?

We would like to collaborate with the selected vendor to define the specific questions.

10. This RFP excludes analyses of both the survey and interview results, explaining it will be done internally. Could you help us to understand why the work is delineated as such?

CHFA has a Research and Strategy Division with the capacity to analyze quantitative and qualitative data. We would like an objective third party to encourage survey responses and collect those responses, and the RFP seeks to address that portion of the research project. We welcome the Vendor's collaboration with the reviewing the results of the data analysis and making recommendations to address any gaps identified by the research.

11. The RFP states that a "sample of residents will be surveyed for this research":

o How many affordable housing residents/families are a part of the multifamily portfolio?

As of 12.31.2021, CHFA had 73,452 units in 972 developments housing over 110,000 residents

o What sample size do you anticipate for survey invitations?

We would like to collaborate with the vendor on sample size for surveys, we would like to sample enough residents to have a representative sample within the areas of stratification listed in the RFP. We are looking for the vendor's expertise to help define sample size.

o What sample size do you anticipate for interviews?

We do not have a pre-determined minimum number of interviews established. If gaps are identified as part of the survey responses, we would seek to interview residents to understand the nature and context of the gaps. The maximum number of interviews anticipated is 30, however we are flexible based on the gaps identified in the survey, and we would be open to changes in timeline and cost if a higher number of interviews are required. Interviews are likely to be conducted via phone or video/internet calls.

12. Does CHFA have existing data regarding the stratification criteria (self-identified race/ethnicity specifically), or will these data be collected in the survey and subsequently stratified?

As of 12.31.2020, 30% of resident households identified as Hispanic or Latino, 15% identified as Black or African American, 47% identified as White, not Hispanic or Latino, 6% identified as other race or multi-race, and < 1% identified in each of the categories: Asian, American Indian, Alaska native, Pacific Islander, or Native Hawaiian.

13. Does the team anticipate utilizing already existing communication channels with potential survey respondents? (Does the team have an existing listserv for those who could be potentially included in the sample? Does the team have an existing directory to engage individuals in a non-digital form?)

We would work with the property managers and resident service coordinators to determine the best method of contacting residents. CHFA does not maintain a resident listserv.

14. What is the team's best estimate for an ideal project timeline? {copy above}

Once a vendor is selected, we anticipate the contract process between CHFA and the selected vendor to be complete within 30 days. We have flexibility to work with the vendor on a specific starting date, and we would like the survey portion of the project to be complete by the beginning of Q4 2021.

15. What is the team's best estimate for an ideal project budget?

We do not have a specific budget as an ideal because we understand that different Vendors will propose varying methodologies, and we are open to those diverse proposals.

16. Throughout it is mentioned surveying and the first bullet point actually explains stratified sampling. Will the vendor run the sampling, or will CHFA? The link to the CHFA home map was nice to see, but I notice only single dots on top of multifamily units, not on each unit. Will the stratification be based on those dots, or will the stratification be based on each unit. The second dot eludes some of this, but more clarity would be greatly appreciated. Your response to this will help dictate our approach. I should mention, I could foresee a combined approach where sampling occurs by dot, then there is a method to be used at each facility (e.g. every other unit starting from the northernmost unit, etc. etc.).

We would collaborate on the methodology for stratifying the sample. We expect that the collaboration for creating the methodology for stratifying the sample may take longer than selecting the sample (the programming involved). We are open to stratifying at the development level and asking each resident in a development to respond to the survey. If we stratify at the unit level, the Vendor will work with the property development manager to determine the best method for delivering the survey/survey link to the selected resident.

17. Does CHFA already have an idea of how many surveys should be completed? This will certainly dictate the surveying costs and will impact the follow-up interview costs.

We would like to collaborate with the vendor on completion number of surveys in order to have the survey results be generalizable. We would like to sample enough residents to have a representative sample within the areas of stratification listed in the RFP. We are looking for the vendor's expertise to help define sample size based upon their strategies for attaining a certain response rate. As an example,

a vendor with an expected response rate (based on their response strategy) of 20% would need to sample twice as many residents as a vendor with a strategy proven in the past to have a 40% response rate.

18. Do you have ideas on the amount of follow-up surveys you would like to complete. If you do not, that is fine as you all ask for an hourly rate for interviews either way.

After the survey phase is complete, we would like to complete follow-up interviews. We do not have a pre-determined minimum number of interviews established. If gaps are identified as part of the survey responses, we would seek to interview residents to understand the nature and context of the gaps. The maximum number of interviews anticipated is 30, however we are flexible based on the gaps identified in the survey, and we would be open to changes in timeline and cost if a higher number of interviews are required. Interviews are likely to be conducted via phone or video/internet calls.

19. In Proposal Requirements there is mention of an "Appendix A". Where is this located?

Appendix A was moved to earlier in the document and is on page 4. The header for Appendix A was deleted. Thank you for noticing that.

20. To effectively estimate the level of effort for the stratification and proposed services outlined in the RFP, it would be helpful to have clarification on whether CHFA is interested in aggregating resident survey data/results across all properties and report on the overall portfolio or if the intention is to report survey data/results by individual properties.

We are primarily interested in aggregating resident results. We do not intend to report survey data/results by individual properties.

The questions #1-#20 were received prior to 8 am MT on 4.30.2021 and were posted to CHFA's website on 4.30.2021. The RFP allows until 5 pm MT for questions. Questions 21 – 53 were received between 8 am and 5 pm MT on 4.30.2021 will be posted to CHFA's website no later than 5 pm MT on 5.3.2021.

21. Will we have access to residents' email addresses?

CHFA does not have email addresses for residents. It is possible that on a development-by-development basis, residents could be asked to opt in/volunteer to give email addresses, but we do not have an email list.

22. Do you have a sampling frame for the housing units across the buildings (i.e., do you have information that can be provided for recruitment purposes, such as name, address, phone number)?

The Vendor and CHFA will collaborate with the development manager and/or resident service coordinator to distribute the survey (link, paper copy, etc.) to the residents.

23. Have you engaged in prior survey/evaluation work in this area and are there reports that can be shared?

CHFA has not completed this type of data collection process for our multifamily residents in the past.

24. If some in person interviews are required, will building managers' approval for going into buildings be obtained by CHFA prior to the contract or will that be something that the Vendor will need to do?

CHFA may assist the Vendor in obtaining the building manager approval if necessary.

25. Is there a page limit or formatting guidelines for the proposal?

There is no page minimum or maximum, and there are no formatting requirements for the proposal.

26. Who is responsible for the survey sampling? The vendor? CHFA?

CHFA would like to collaborate with the vendor to determine the sampling methodology. We are open to stratifying the sample by development rather than unit. CHFA will offer assistance in developing strategies to reach the residents selected.

27. What is the anticipated sample size for the surveys to be collected? Are there any ballpark numbers for how many surveys per strata?

We would like to collaborate with the vendor on sample size for surveys, we would like to sample enough residents to have a representative sample within the areas of stratification listed in the RFP. We are looking for the vendor's expertise to help define sample size.

28. Will the Vendor be responsible for survey translation to/from all needed languages?

Yes. The Vendor may engage subcontractors for translation services if needed.

29. Will survey/interview responses need to be provided to CHFA in English? (In case there are any open-ended questions included in the surveys).

Yes

30. Do property managers know that the survey will take place?

- a. Will they be notified in advance by CHFA?
- b. Are property managers required to collaborate in the effort? Can they refuse to participate?

Property managers will be notified in advance by CHFA, and CHFA will introduce the Vendor to the property managers as our partner. Property managers are able to refuse to participate.

31. Do residents know of the survey?

- a. Will they be notified of the survey in advance by CHFA?
- b. Is survey participation voluntary?

Residents will be notified in advance by CHFA. Participation in the survey is voluntary.

32. What contact and demographic information be provided by CHFA to Vendor on property managers, potential survey respondents, and potential interviewees?

Property manager email address and/or phone number will be provided to the Vendor. Any resident demographic will be provided on a voluntary basis by the resident as part of the survey. CHFA is able to provide general demographic information at a property level basis (age, race/ethnicity, income) if there are sufficient units in the property to assure resident privacy. If there are too few units, CHFA is able to provide demographic information at a county or regional level. CHFA is not able to provide specific resident contact information.

33. Has CHFA conducted any similar surveys in the past? If yes, is there a report available to potential Vendors? Any lessons learned from similar efforts in the past?

CHFA has not completed this type of data collection process for our multifamily residents in the past.

34. In addition to English and Spanish, what languages are anticipated to be needed for surveys and interviews?

We do not know all the languages our residents speak although we have residents who speak Russian, Chinese, Korean, and Vietnamese. The property managers and resident service coordinators will help us understand if these residents are willing and able to complete a survey in English.

35. Are there page limits for the proposal?

No

36. Can you share the anticipated available budget for the project? Will the available budget be separate for the survey and interview portions of the project?

We do anticipate separate budgets for the survey and interview portions of the project. We do not have a specific budget because we understand that different Vendors will propose varying methodologies, and we are open to those diverse proposals.

37. The RFP asks for an estimated timeline for completion of the project. Does CHFA have an expectation about when the project should start and finish?

We anticipate the contract process between CHFA and the selected vendor to be complete within 30 days. We have flexibility to work with the vendor on a specific starting date, and we would like the survey portion of the project to be complete by the beginning of Q4 2021.

- 38. Would CHFA be open to including a CATI (computer-assisted telephone interview) option for the approximately 10% of residents with limited technological access and/or for residents with limited reading comprehension?

Yes, with prior approval from the residents.

- 39. What is the expected number of languages we'll need to translate the tool into?

The survey will need to be translated into Spanish. We do not know all the languages our residents speak although we have residents who speak Russian, Chinese, Korean, and Vietnamese. The property managers and resident service coordinators will help us understand if these residents are willing and able to complete a survey in English.

40. As we think about the sampling structure can you provide more information on the population of properties, i.e.:

- Number of properties *972*
- Number by property type (senior, family, etc.) *33% senior residents; 31% residents have children; 24% single person households; 12% adults without children*
- Number by urban/rural *The urban/rural split is approximately 90%/10%*
- Ages of properties, *approximately half of our LIHTC properties have placed in service since 2008.*

Race/ethnicity of property residents?

As of 12.31.2020, 30% of resident households identified as Hispanic or Latino, 15% identified as Black or African American, 47% identified as White, not Hispanic or Latino, 6% identified as other race or multi-race, and < 1% identified in each of the categories: Asian, American Indian, Alaska native, Pacific Islander, or Native Hawaiian.

41. All of the above information supports the stratification of the sample. What is the goal of the stratification? Does CHFA have a confidence interval goal for certain sub-strata?

We believe stratification will help us identify if there are gaps in rural properties compared to urban, for example. We understand that we may not be able to combine strata and achieve generalizable results, however we are interested in results with a 95% confidence interval. We are open to a 90% confidence interval for some of the smaller strata, and we understand that for certain groups, even this confidence level might not be realistic.

42. Also, some CHFA reports also use congressional districts as regions for reporting. Does CHFA expect to be able to report information by a certain confidence interval by congressional district?

No, for this research, we do not require reporting by congressional district.

43. Will the contractor redact or anonymize responses before providing to CHFA?

Yes, that is the preference, however, if the responses are not anonymized, CHFA is able to anonymize responses upon receipt.

44. Will all of the survey data be provided to CHFA in English or in the language the survey is taken?

English

45. Is the contractor for survey translation process, including identifying translators, translating the survey, and translating the responses? Should the costs of all of these activities be included in the proposal? How many different languages does the CHFA believe will be needed to administer the survey?

Yes. The survey will need to be translated into Spanish. We do not know all the languages our residents speak although we have residents who speak Russian, Chinese, Korean, and Vietnamese. The property managers and resident service coordinators will help us understand if these residents are willing and able to complete a survey in English. The costs should be included in the proposal.

46. When pricing the interviews should the price include the following elements:

- Scheduling *Yes*
- Any interpretation at or translation of interviews, and *Yes*
- Other expected interview components from CHFA? *Interview recording*
- *Participant stipend range if you propose to provide a stipend to participant*

47. What products of the interviews is CHFA expecting, e.g.: audio files, transcriptions, translated transcriptions, and/or analysis of the interviews?

Yes to audio files, and transcriptions provided in English (either translated or as the primary language). We expect to analyze the interviews at CHFA, so we do not need a quote for analysis. We would appreciate an hourly rate for follow-up collaboration or a bundled quote for # of collaboration hours for the project (i.e. meetings)

48. Does CHFA expect the interviews to be in person, virtual/phone, or both?

We anticipate them to be virtual/phone.

49. The RFP discusses use of incentives for respondents? If so, should those incentives be part of the proposed budget or will CHFA provide the incentives?

Yes, please recommend an incentive amount/range.

50. The proposal requirements section includes “All proposals must include responses to the information found on Appendix A.” There is no Appendix A section to the RFP? How should we meet this expectation in our response?

Appendix A was moved to earlier in the document and is on page 4. The header for Appendix A was deleted. Please use page 4 as the response format.

51. What information will CHFA provide to support the survey distribution? Will CHFA be able to provide accurate information on family:

- Phone number
- Email
- Mailing address, and
- Language spoken?

CHFA will collaborate with the Vendor and the property managers and resident service coordinators to determine the best method of contacting residents.

52. Does CHFA have an expected/estimated size of the survey sample?

We would like the Vendor to recommend the sample size based on the larger stratification goals.

53. Does CHFA have an expected response rate for the data collection?

We expect different vendors to have experience with response rates and methodological suggestions to maximize survey response rate. We have not surveyed our residents in the past, so we do not have a baseline.