

REQUEST FOR PROPOSALS
Town of West Boylston RFP #2022-H1
Affordable Housing Consultant Services

The Town of West Boylston (the “Town”) is seeking proposals for affordable housing consulting services. Qualified persons or businesses are requested to submit proposals to James Purcell, Interim Town Administrator, West Boylston Town Hall, 140 Worcester Street, West Boylston, Massachusetts 01583 no later than 12:00 PM (noon), June 22, 2022. The Town reserves the right to reject any or all proposals or to cancel this Request for Proposals if it is in the Town's best interest to do so. Proposals shall be submitted clearly marked **“West Boylston Community Housing Specialist Contract.”**

The Town has determined that this contract is subject to the Uniform Procurement Act, G.L. c. 30B. Therefore, the provisions of G.L. c.30B are hereby incorporated by reference as this Request for Proposals.

The Town recognizes that municipalities play a central role in affordable housing from initial proposal through to on-going monitoring, irrespective of whether the housing is sponsored by a private developer under G.L. c.40B or a public or non-profit organization. Municipalities are responsible for the management of many details and aspects of affordable housing projects in order to derive maximum community benefit and to maintain local control. Many town responsibilities regarding affordable housing projects are not regular core responsibilities of the town administrator or other town personnel. Local control takes many forms — it articulates local requirements in private c.40B projects, it monitors and enforces compliance to conditions and requirements, and it develops shared models and best practices such as review criteria, standards and guidelines. The Town believes that focusing attention on affordable housing activities is not primarily an advocacy action; it is a proactive approach for the Town to attend to the complex details of affordable housing. By providing dedicated and knowledgeable expertise, the Town benefits by meeting and exceeding requirements for local control and management of affordable housing developments.

I. **Scope of Services**

Under the auspices of the Town, and in conformity with all applicable laws and professional standards, the Town seeks a consultant (“applicant”) to provide the following services required for the proper coordination, administration and reporting of affordable housing programs and activities. The scope of work will encompass a set of core services, as described below. The applicant may be available for supplemental services, which would be separately bid, if applicable, and contracted with a separate scope of services defined per project.

It is expected that all services will be provided for a term of one year, beginning July 1, 2022 and ending June 30, 2023. Compensation for services provided under the proposed engagement during this period shall not exceed \$20,000.00. The agreement will provide for two, one-year renewal options, exercisable at the Town’s sole option.

Core Services: The Town requires the consultant selected to provide the following services:

1. **Create framework; develop standards and guidelines; recommend policy and process**
 - Create and communicate housing guidelines for local adoption with stakeholders;
 - Provide on-going support to the Town and be available for ad hoc phone support;
 - Provide general information and have discussions on initial project concepts;
 - Provide general expertise to local stakeholders, including ZBA; and the general public on process, opportunities, requirements through education, training, and presentations;
 - Provide information for local residents: create interest list, provide contact point, perform outreach for new housing opportunities;
 - Assist in completion of Commonwealth Capital Application and other municipal surveys and information, as requested;
 - Investigate, assist and develop bylaws, programs, and projects to create affordable housing.

2. Monitor existing projects and units — Ensure and enforce compliance, preserve units

- Create a central repository of project legal documents for all projects;
- Review projects with respect to Regulatory Agreement requirements;
- Identify compliance violations and propose course of action;
- Ensure projects are in compliance with applicable limited dividend requirements through cost certification review;
- Review and monitor the Town's subsidized housing inventory;
- Assist in locating eligible buyer on resale of affordable housing units.

3. Assist with specific proposed projects - Central contact point for pre-permitting activities for new projects

- Assist Town boards and developers during the pre-application process, facilitating site and conceptual plan review, project concepts and designs, obtaining community input and comment;
- Analyze projects using locally adopted rules, State guidelines and regulation, and best practices;
- Recommend mitigation from the Town's perspective;
- Review finalized plans with regard to the affordable component, including unit mix, disbursement, cost, governance, schedule, marketing;
- Provide technical support during the application and 40B review process, interacting with DHCD and subsidizing agency;
- Facilitate feedback from Town boards for permitting authority;
- Coordinate Regulatory Agreement, and other local agreements as appropriate;
- Prepare project budgets and schedules, sources and uses, identify local commitment and coordinate applications for local, state and federal resources, including housing grants and loans, assistance and public services or other sources.

4. Develop programs and projects to create affordable housing

- Investigate Town owned land and other reasonably priced parcels;
- Develop partnerships with developers to increase the affordable component in developments. Develop and implement programs, and projects to create affordable housing including issuing RFP, conducting feasibility studies, and administer through on-going operation.

Supplemental Services:

Any supplemental services would provide value-added responsibilities focusing on assisting specific projects and locally sponsored unit creation development and administration. These services would be estimated and contracted on an as-needed basis by the Town, with specific defined scope of services, and generally contracted at the same rate as the core services. The Town shall solicit separate proposals or prices quotes for these services as necessary.

Anticipated services include, but are not limited to:

Administer lotteries, act as Monitoring Agent and qualify eligible applicants

- Develop marketing plans per regulation and guidelines;
- Perform outreach and market units;
- Qualify applicants and certify eligibility;
- Administer lotteries, and assist applicants to close.

II. Proposal Submission Requirements

General Laws, Chapter 30B, Section 6 requires the Submission of separate "Price" and "Non-Price" proposals.

(a) Price Proposal

A complete price proposal should contain an amount for the completion of the scope of services, using the enclosed "Price Proposal" form.

(b) Non-Price Proposal

In addition to the Price Proposal as described in (a), applicants should submit three (3) Non-Price Proposals which provide, at minimum, the following information:

- i. A complete documentation of all professionals, firms, and subcontractors who will work on performing services delineated in the Scope of Services and the principal firm in general. The Town will not consider any proposals which do not provide sufficient documentation proving that the applicant has at least 5 years of related, relevant experience or an equivalent combination of education and experience.
- ii. Qualifications and experience of the professionals, firms, and subcontractors to be utilized in the undertaking of the agreed upon services, particularly the qualifications and successful experience in the areas: (1) affordable housing administration experience, (2) knowledge of legal requirements of the G.L. c.40B and LIP process, and (3) experience providing services to, or relevant experience as an officer or employee of a municipality or state agency, specifically in the Commonwealth of Massachusetts. The resume or curriculum vitae of the professionals assigned to the project shall be included in the proposal. The applicant shall assign and identify a Project Manager included as a professional whose qualifications are delineated.
- iii. Three (3) relevant references for both the key professionals involved and the principal firm involved with the delivery of the agreed upon services, and also, for all subcontractors to be used, if any, including: (1) project name and location, (2) municipality, agency or firm for which services were provided, with address, contact, person, and telephone number, and (3) brief project description and budget.
- iv. A detailed statement of the applicant's approach to the project tasks and description of services to be provided as outlined in the Scope of Services. This

- statement should also address the applicant's suitability for the assignment based upon the Comparative Evaluation Criteria contained herein.
- v. A detailed staffing plan and proposed Work Plan for the Project based upon the Scope of Services contained herein. The Work Plan shall include the estimated hourly commitment for each project task identified in the Scope of Services contained above in Section I. for each principal, professional, and subcontractor to be used to render services under the project and delineate the level of commitment expected from the Town of in-kind assistance from the municipality.
 - vi. Detailed temporal and scheduling plan, and statement of commitment.

(c) Submission Procedures

Sealed "price" and "non-price" proposals must be submitted in marked separate envelopes, and placed in a larger envelope marked on the outside: (Name of Individual or Firm) West Boylston Community Housing Specialist Proposal RFP #2022-H1. Questions may be referred in writing to the Affordable Housing Trust via e-mail at nlucier@westboylston-ma.gov or regular mail at 140 Worcester Street, West Boylston, Massachusetts 01583. Questions may be submitted no later than 10 days prior to the proposal submission deadline. All questions will be shared with all recipients of the RFP who have provided accurate contact information to the above email address. It is the responsibility of all potential applicants to provide accurate contact information to the above email address, including a reliable e-mail address for the purpose of communicating details about the proposals, sharing questions and clarifications, and issuing addenda. Proposals must be submitted no later than 12:00 PM, June 22, 2022 at the Office of the Town Administrator, Town Hall, 140 Worcester Street, West Boylston, Massachusetts 01583. Award of the contract may occur up to 60 days after submission of proposals, and price proposals shall remain firm for at least 60 days. The time for acceptance of award may be extended by mutual agreement of the Town and the party submitting the successful proposal.

III. Evaluation of Proposals

(a) Non-Price (Technical) Proposal

1. Minimum Evaluation Criteria

Each non-price (technical) proposal shall first be reviewed to ascertain whether or not the following Minimum Evaluation Criteria have been met:

- Submission was made in compliance with the requirements of this RFP, including the inclusion of adequate copies of the non-price proposal and a separate and sealed price proposal in one larger package.
- The Non-Price Proposal contains the information required under Section II(b) – Non-Price Proposal. Additionally, applicant must have at least five years of related, relevant experience or an equivalent combination of education and experience to be considered by the Evaluation Committee.

Proposals not meeting all of the above Minimum Evaluation Criteria shall be summarily rejected.

2. Comparative Evaluation Criteria

Each non-price (technical) proposal meeting the Minimum Evaluation Criteria shall be rated according to the following comparative Evaluation Criteria and each proposal will receive one of the following four rankings per criteria:

Highly Advantageous – Proposal exceeds the Town’s criteria	= 5 points
Advantageous – Proposal fully meets the Town’s criteria	= 3 points
Not Advantageous – Proposal does not fully meet the Town’s criteria	= 1 point
Not Acceptable – Proposal does not meet or address the Town’s criteria	= 0 points

A. Quality of References. Reference checks will be performed to evaluate the special skills, relevant expertise, the quality of past performance in comparable projects, and the ability to perform assigned tasks in a timely and accurate manner of the applicant, including all subcontractors, principals, and the project manager.

B. Type of Experience. The Town shall evaluate the quality and depth of relevant experience in the areas of: (a) Experience with engineering, design, and supervision of infrastructure projects funded by the Massachusetts Department of Housing and Community Development; (b) Demonstrated knowledge and experience with all applicable requirements of the Massachusetts DEP and MEPA, US EPA, Massachusetts Contingency Plan and other applicable code and regulatory provisions and agencies; (c) Have a multi-disciplined staff, geographically accessible and available to be assigned to work expeditiously on numerous concurrent projects in the Town of West Boylston; and (d) Familiarity with the preparation of plans and specifications in accordance with Massachusetts Procurement Laws.

C. Quality of the Statement of Proposed Level of Service. The Town of West Boylston will carefully review the statement contained within the proposal as required under Section C, Subsection B. Statement of Proposed Level of Services and Project Approach, 1 through 3, inclusive, to determine:

- i. The municipality-specific approach of the applicant best suited to the needs of the Town;
- ii. The quality of the applicant's written work; and
- iii. The quality of expertise and skills necessary to undertake the tasks required for the project.

D. Quality of Presentation Skills, and of the Qualifying Interview. The Town, or its subcommittee, will require a personal interview with and presentation from all applicants who meet or exceed the Minimum Evaluation Criteria.

E. Years of Experience. The Town will review the number of years key members of the consulting team have in the appropriate fields of discipline required for successful implementation of the project. Five years of experience is the standard for the principals of the firm, subcontractor firms, and the project manager and three years is the standard for other professionals assigned to the project.

(b) Price Proposal

Methodology for Determining the Best Price

The Price Proposal must contain pricing information on the requisite forms as required under Section II(c) – Price Proposal (a). The "best price" shall be the lowest price proposal.

(c) Most Advantageous Proposal

Following the separate evaluation of the Non-Price proposals, the Chief Procurement Officer or designee shall determine which proposal is most advantageous based upon consideration of the rankings from the non-price proposal evaluations and the price proposals, and award the contract accordingly. The contract shall be subject to execution by the Town of West Boylston Board of Selectmen.

PRICE PROPOSAL
COMMUNITY HOUSING SPECIALIST SERVICES

Price proposal of _____ (hereinafter called "Applicant")*

- (____) a corporation, organized and existing under the laws of the state of _____
- (____) a partnership
- (____) a joint venture
- (____) an individual
doing business as _____

To the Town of West Boylston, Massachusetts:

The Applicant agrees to provide community housing specialist services to the Town in accordance with the requirements and scope of services set forth in the Request for Proposals:

- A Year 1: \$_____ (presented as an hourly rate for consulting services)
- B. Option Year 2: \$_____ (presented as an hourly rate for consulting services)

The Applicant agrees that this price proposal shall be good and may not be withdrawn for a period of sixty (60) days after the opening of bids.

Within thirty (30) days of receipt of the written notice of contract award, the Applicant will enter into a contract with the Town. In the event that the successful applicant fails to timely execute the contract delivered by the Town, the Town reserves the right to rescind the award and to make a new award to the next highest ranked proposal, unless the parties agree in writing to extend this time period.

Respectfully submitted:

Date: _____

By: _____
(Signature)

(Type Name of Bidder)

(Title)

(Business Address)

(City and State)

(Telephone Number)

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