

Sudbury Housing Trust
Notice of RFP

**Disposition of Municipal Owned Property at
278 Maynard Road
Sudbury, Massachusetts**

March 13, 2009

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Section 1: RFP Introduction

The Sudbury Housing Trust (the 'Trust'), an agent of the Town of Sudbury, Massachusetts, is soliciting proposals for the construction of a multi-unit affordable housing development on an unimproved parcel at 278 Maynard Road in Sudbury (Town Assessor's map E07-400).

This parcel of land is owned by the Sudbury Housing Trust which has the sole purpose to provide for the preservation and creation of affordable housing in the Town of Sudbury for the benefit of low and moderate income households. The Trust intends to convey the property to the successful responder for the construction of a multi-family affordable development which units will be sold to first time homebuyers.

The purpose of this RFP is to select a developer with experience in constructing affordable housing.

Applicants should submit responses to this RFP on or before

Friday, May 1 2009 1 pm to:

Sudbury Housing Trust
Attention: Beth Rust
Office of Planning and Community Development
278 Old Sudbury Road
Sudbury, MA 01776



Michael C. Fee, Chairman, Sudbury Housing Trust

Section 2: Instructions to Proposers

The RFP may be obtained from the Department of Planning and Community Development, Monday through Friday, between 8:00 a.m. and 3:30 p.m.. In addition, RFP's will be mailed to interested parties upon request directed to the Department of Planning and Community Development at (978) 639-3387 and requesting a copy.

Questions regarding this RFP may be directed to the Project Manager, Community Housing Specialist, Beth Rust, 278 Old Sudbury Rd., Sudbury, MA 01776, e-mail: rustb@sudbury.ma.us , (978) 639-3388.

Requests for interpretation or supplemental information must be made in writing via e-mail and must be received by the Project Manager by e-mail no later than April 10, 2009. Property information referenced below may be reviewed in the office by appointment only. Any interpretation or supplemental information provided to proposers will be issued in the form of written addenda to the RFP and will be sent by e-mail to all persons on record as having received the RFP no later than April 17, 2009.

Proposals must be received by the Planning and Community Development Office, 278 Old Sudbury Road, Sudbury, MA 01776 in accordance with the instructions in Section 9 below.

Regardless of the cause of delay, no proposals that are received after the deadline shall be given any consideration. The responsibility for assuring the receipt of proposals before the specified closing time is incumbent upon the proposers.

Section 3: Project Introduction

The Trust invites qualified development organizations to submit proposals to complete development of multi-family affordable homeownership units on the parcel at 278 Maynard Road.

The Trust is prepared to collaborate with the developer during all phases of the project and to assist in making the project a success for the community.

The purpose of this RFP is to select a developer who can demonstrate the experience and capacity necessary to develop the project in conformance with the Sudbury Housing Trust's Goals and Guidelines detailed in Section 6 below, and best meets the Minimum Evaluation Criteria described in Section 11 below.

Section 4: Property Description/Site Characteristics

Location and Site Information: The property consists of an unimproved parcel of land located at 278 Maynard Road at the northwestern corner of Marlboro Road. The property is 0.97 acres and contains ~ 42,178 square feet. It has 180 feet of frontage on Maynard Road. The parcel map is included below. A previously existing house, slab and garage have been demolished and removed.

The parcel has been surveyed by the Trust and is staked. A topographical survey has also been completed.

Public water is available at the property.

Environmental Review: The property will be conveyed "as is". The Trust has completed a Phase I Environmental Site Assessment for soil, water and asbestos and has found no contamination.

Septic and Soils: The Town has no public wastewater facilities. The property has been tested for on-site septic witnessed by the Sudbury Board of Health, and there is a preliminary design of primary/expansion systems installed in the front of the parcel on Maynard Rd, supporting up to 10 bedrooms. All development should retain a 60' buffer from the road for these facilities.

Section 5: Zoning and Permitting Description

It is expected that zoning relief required for building on this parcel will be obtained through a Comprehensive Permit under M.G.L. c 40B to provide the exception to allow for the construction of multi-family dwellings, which is not an allowed use under local zoning. While the 40B application enables relief from the setback, parcel size and other local zoning bylaws, it is expected that the developer will conform to as many of those requirements as possible.

The Town has published Guidelines for Comprehensive (40B) projects, available on the Town website, and expects the successful developer to review the project utilizing those guidelines.

The current zoning requirements in Sudbury for residential buildings include:

- 40,000 square feet
- 180 feet of frontage
- 20 feet side yard setback
- 30 feet rear yard setback
- 40 feet front yard setback.

In conformance with standard procedure, the developer shall be required to apply for the 40B permit through the DHCD LIP program or MassHousing, and once a site eligibility letter has been received, apply to the Sudbury Zoning Board of Appeals for a Comprehensive Permit.

The Trust is prepared to assist the developer in the submission of the site eligibility material, and be in attendance at the Zoning Board hearings.

Section 6: Sudbury Housing Trust Goals and Guidelines

The Trust has the following requirements for the housing units developed on the parcel.

1. The Trust contemplates the construction of up to 6 units of housing for sale to households earning up to 100% of the Area Median Income (CPA eligible). Two of the units will be sold to households earning between 80% and 100% of the Boston AMI, and four of the units will be reserved for households under 80% of the Boston AMI, to be further defined in an executed Regulatory Agreement. The Trust requires that each and every unit be sold to households earning below 100% of the Boston AMI to be eligible for Community Preservation Act funds, protected with a perpetual deed restriction that survives foreclosure. The Town is interested additionally in 'counting' units on the Subsidized Housing Inventory for the purposes of compliance with MGL c 40B.

2. The Trust requires a design consistent with the drawings and concepts included below.

Sited on a sloping parcel at the intersection of Maynard Road and Marlboro Road, these new units are grouped around a central garden common that also serves as an entrance to each unit. A new one-way drive skirts a designated septic field area, and enters from Maynard Road.

The buildings consist of 6 units, one handicapped accessible (potentially), in two main buildings, as well as a third building which houses storage spaces for each unit, as well as trash, recycling and mailboxes.

There are 10 parking spaces to the east of Building A, with a designated loading zone for ease of move-in and delivery. The units navigate the slope by stepping up the hill. They also have simple repeated gable roofs with shed dormers to maximize economy of construction.

The units range from 926 SF (one bedroom) to 1,513 SF (two bedroom, with the first floor 803 SF and the second Floor 710 SF).

The mechanical systems are designed in the floor plans. Each unit has independent heating and hot water, incorporating point of use hot water heaters and high-efficiency, direct-vent boilers. The units also have the option for Heating/Air Conditioning, with the air-handling unit located in each unit's attic space and condensing units located directly outside.

3. The Trust requires upgraded materials (hardiplank) and design features (window trims, elevation detail) to be used so to blend in well with the neighborhood. These upgrades should be included in the baseline project budget.
4. The Trust is interested in exploring green building designs especially those which will reduce on-going utility and other expenses. The development has been planned with the following sustainable design strategies in mind:
 - Compact and space-efficient design and minimal site impact
 - Careful siting and window placement to maximize natural light
 - High insulation values in walls and roofs and a tight air barrier
 - Double- or triple- glazed windows
 - High-efficiency furnaces
 - Energy star rated appliances

The Trust is interested in additional sustainable strategies to be pursued as an optional green package to include:

- Rainwater harvesting for landscape irrigation
 - Building-wide recycling and composting programs
 - Photo-voltaic or solar panels
 - LED or CFL high efficiency light fixtures
 - FSC certified wood
 - Sustainable paving surface
 - Local, reclaimed and recycled building materials
5. The Trust actively manages the affordable housing program in Sudbury and will perform both the Lottery and Monitoring Agent services.
 6. The Trust is prepared to fund a portion of the project and expects that these local funds will be used to leverage state and public funds.

Section 7: Site Control and Title Considerations

The Trust purchased the parcel in August 2008 in a private sale and is the holder of the deed.

The Trust will execute a Purchase and Sale Agreement with the developer upon the following:

- Design and site plan approved by Trust
- Unit mix and buyer selection process approved by the Trust
- Project budget and schedule approved by the Trust.

The Trust will close with the developer upon completion of the following:

- a. Issuance of the Comprehensive Permit by the Sudbury Zoning Board
- b. Issuance of the Final Approval letter by the Subsidizing Agency
- c. Obtaining all project funding.

Section 8: Project Scope

The overall project includes the construction of multi-family units of deed restricted housing, and the sale of those homes to selected and qualified households. This will include many tasks and details including securing of a Comprehensive Permit, securing of construction funds and public financing, the construction of the development, sales to selected and eligible household and other community outreach aspects.

Section 9: Proposal Submission Requirements

Each final proposal must include a sealed Proposal clearly marked "RFP: 278 Maynard Road Development" along with the proposing developer's name and address, and twelve (12) copies of the proposal.

All Proposals shall include, as a minimum, the following information:

1. Name and address of lead developer.
2. Name of contact person, including phone, fax and email information.
3. Name and address of all partners, officers, and directors and any other person with an ownership interest greater than 5% of all firms working on the project.
4. Names of any Town officials or employees who are related to any of the partners, officials or directors of any firm working on the project, or others who have any ownership interest in the firm.
5. Names and resumes of development respondent who will be assigned to work on the project including any registrations and certifications.
6. Demonstration that the proposal meets the Minimum Criteria in Section 11 below.
7. Demonstration that the proposal meets the Comparative Evaluation Criteria in Section 12 below.
8. Project Budget, including the sources and uses of funds, with an optional 'green' package as detailed in Section 6, with detail as required by the subsidizing agencies and project eligibility requirements.
9. Description of buyer selection plan and determination.
10. A list of recent similar projects, including a brief description of the project, location, costs, site plan and date services provided. Identify projects as completed or underway. Photographs or other visual representations of recent projects should be included where possible.
11. Contact name, phone number, email address and project name for up to 3 references for similar projects, including one from a subsidizing agency.
12. Proposed scope of the project and list of tasks to be completed, proposed timetable and schedule for completion of the project.
13. Other information which will document the respondent's capabilities and qualifications for the project.

Section 10: Acceptance or Rejection of Proposals

The Trust reserves the right to accept or reject any or all proposals, to waive minor informalities, and to make awards as may be deemed to be in the best interest of the Town. Those who enter into contractual obligations with the Town must not discriminate against qualified, handicapped individuals in their employment decisions. The Town will evaluate the proposals submitted and either accept one proposal or reject all of the proposals.

Proposal corrections, modifications, or withdrawals may be submitted until the proposal deadline; any such shall be in writing in a sealed enveloped appropriately labeled and delivered as indicated above.

The Town reserves 45 days from the proposal deadline to make an award if it is in the best interests of the Town to do so.

No more than one proposal from the same developer, whether or not the same or different names, shall be considered. Reasonable proof for believing that any consultant is interested in more than one proposal for the work contemplated shall cause the rejection of said proposals made by him, directly or indirectly.

Material submitted in response to this RFP will not be considered confidential under the terms of the Massachusetts Public Records Law.

Section 11: Minimum Qualifications of Developer

The Town is seeking a development organization for the construction and sale of multiple affordable homes in Sudbury. The minimum qualifications must include:

1. Respondents must be associated with an organization that provides affordable housing.
2. Respondents must have experience with acquiring and receiving funds from public subsidizing sources, including the State Affordable Housing Trust Fund or the State HOME funds.
3. Respondents must have prior experience developing multi-family housing.
4. Respondents must have prior experience with conducting community outreach.

Section 12: Comparative Evaluation Criteria

In general, respondents must be responsive to the requested information set forth in the RFP. Respondents submitting proposals deemed to be non-responsive shall be given a ranking of Unacceptable.

Specifically, the proposals will be evaluated and rated according to the following criteria:

- I. The respondent includes all the required skills listed in Section 11:
 - Highly Advantageous: The respondent includes more than the minimum required qualifications if shown to be appropriate, either in personnel or prior experience in similar projects.
 - Advantageous: The respondent includes all of the minimum required qualifications.
 - Not Advantageous: The respondent includes less than the minimum required qualifications.

- II. The respondent is experienced and highly qualified in the area of affordable housing:
 - Highly advantageous: Respondent has an average of 10 or more year's experience.
 - Advantageous: Respondent has an average of 5-10 years experience.
 - Not Advantageous: Respondent has an average of less than 5 years experience.
- III. The respondent is experienced with similar projects for small-scale multi-family affordable housing development:
 - Highly Advantageous: The respondent has experience with 4 or more similar projects.
 - Advantageous: The respondent has experience with 2-4 or more similar projects.
 - Not Advantageous: The respondent has experience with less than 2 similar projects.
- IV. Presentation skills of the respondent:
 - Highly Advantageous: The respondent demonstrates extensive experience in public presentation with visual presentation materials and physical plans.
 - Advantageous: The respondent demonstrates some experience in public presentation with visual presentation materials and physical plans.
 - Not Advantageous: The respondent demonstrates little or no experience in public presentation with visual elements and physical plans.
- V. Quality of the References provided:
 - Highly Advantageous: The work of the respondent is deemed excellent by all of their 3 references.
 - Advantageous: The work of the respondent is deemed good or excellent by at least 2 of their 3 references.
 - Not Advantageous: The work of the respondent is deemed good or excellent by 1 reference, or deemed poor by any reference.
- VI. Readiness to Proceed and Complete Project Within Time Frame and Scope:
 - Advantageous: Respondent able to begin upon execution of contract (within two weeks of notice to proceed) and complete entire scope within the projected time frame.
 - Not Advantageous: Unable to begin within 60 days of notification to proceed, or unable to complete entire scope of project.

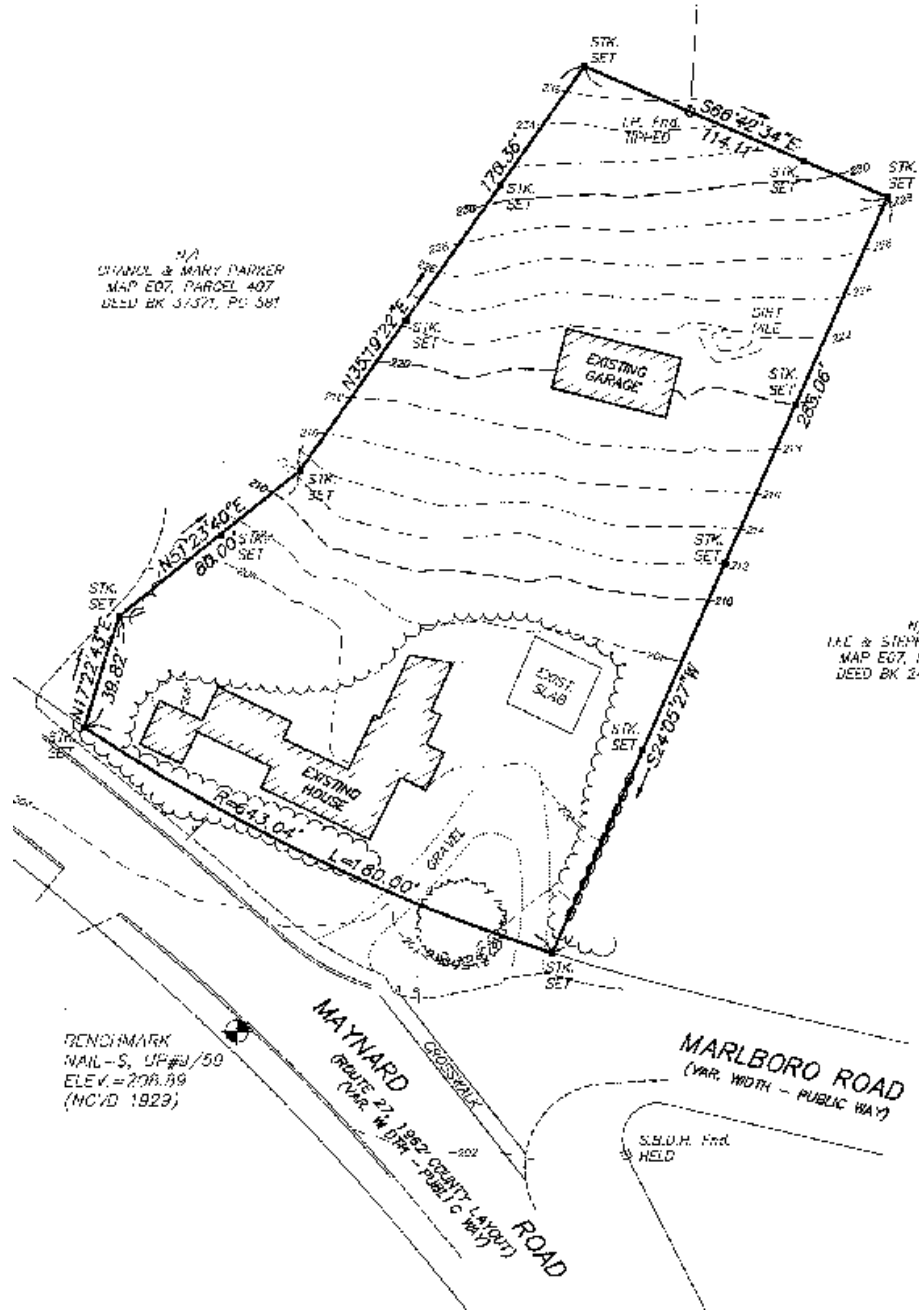
Section 13: Final Selection and Award of Contract

The Trust will review and rate the proposals received, and may select the most highly advantageous proposals for interviews. After the interviews have been conducted, the Trust will recommend the contract award. Said recommendation shall include the compiled scores for each firm's proposal, a copy of the proposal and the interview results.

The contract award, if any, will be made by the Trust upon determination of the most advantageous proposal from a responsible, qualified and responsive respondent, taking into consideration all evaluation criteria set forth in the RFP.

The developer selected for the work will need to provide certification of insurance coverage and will be required to indemnify and hold the Town of Sudbury harmless.

Section 14: Plans





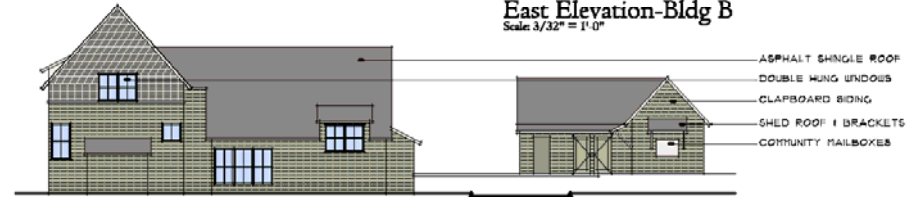
Schematic Site Plan
Scale: 1"=30'



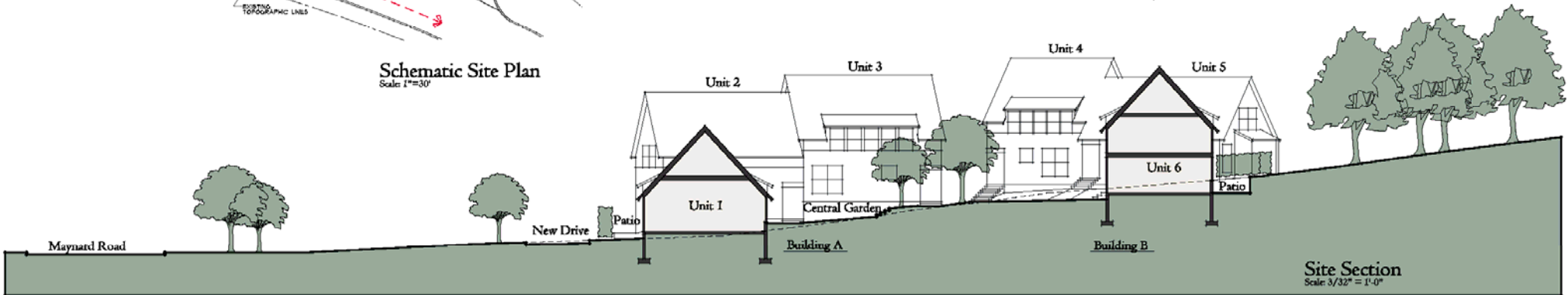
East Elevation-Bldg A
Scale: 3/32" = 1'-0"



East Elevation-Bldg B
Scale: 3/32" = 1'-0"



South Elevation-Bldg A & Bldg C
Scale: 3/32" = 1'-0"



Site Section
Scale: 3/32" = 1'-0"

March 6, 2009

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Eck MacNeely Architects inc.
Architects Interior Design Construction Management



First Floor Plans
Scale: 3/32" = 1'-0"



Second Floor Plans
Scale: 3/32" = 1'-0"

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