

Town of Sudbury, Massachusetts

REQUEST FOR PROPOSALS

Community Engagement Services for Housing Production Plan Update

DATE OF ADVERTISEMENT:

Friday, February 17, 2023

SUBMISSIONS DUE:

Monday, March 20, 2023 at 12:30 PM

Late Submissions Will Be Rejected

DELIVER COMPLETED SUBMISSIONS TO:

Town of Sudbury
Planning and Community Development Department
278 Old Sudbury Road
Sudbury, MA 01776

For further information, please contact:

Adam L. Duchesneau, AICP
Director of Planning and Community Development
Town of Sudbury
978-639-3387 or DuchesneauA@sudbury.ma.us

REQUEST FOR PROPOSALS

Community Engagement Services for Housing Production Plan Update

I. Background

The Town of Sudbury, Massachusetts is seeking a qualified firm to partner with the Regional Housing Services Office (RHSO) to complete an update to the Town's 2016 Housing Production Plan (HPP).

Sudbury has long been a desirable residential community because of its natural areas and open spaces, the community's living history, its strong public school system, exceptional volunteerism, and its small-town feel and sense of community. These attractions, as well as the scarcity of available open land, have made Sudbury housing difficult for many to afford. High land prices contribute to ever-increasing housing costs, which make the town unaffordable to those who desire to move into the community, while an increasing tax burden makes it unaffordable for those who currently reside in the community. For many years now, the Town has worked to address these issues with the hope of preserving economic and social diversity, along with creating more diverse housing stock to promote a greater variety of housing options. Sudbury has committed to supporting and creating affordable housing solutions which respect the historic and natural character of the community. The Town is also increasingly aware of the need to consider smart growth opportunities and environmentally sustainable solutions in all of its projects.

Consultants will be expected to provide community engagement services and overall document management working with the RHSO staff, who will be responsible for completing the needs assessment for the HPP.

The full scope of the entire project consists of an analysis of constraints to housing development, community engagement services, development of housing goals and strategies, and compilation of the final Housing Production Plan document. The RHSO would provide services to update the analysis of constraints to housing development and comprehensive housing needs assessment component.

The Town will be funding the Housing Production Plan update with Community Preservation Act funds approved at the May 2021 Annual Town Meeting.

A copy of the Department of Housing and Community Development (DHCD) approved 2016 Housing Production Plan is available on the State's website and will be made available upon request.

II. Scope of Services

The scope of the services for this Request for Proposals (RFP) consists of community engagement services that provide the framework and support for the development of housing goals and strategies for the compilation of the updated Housing Production Plan document. The RHSO will provide services to update the comprehensive housing needs assessment component.

The Consultant will be expected to assist in developing the updated HPP which outlines the community's current and future housing needs, and identifies the community's strategy for planning and developing more affordable housing.

The updated HPP should incorporate the status of current housing options and existing housing conditions, existing and projected demographic information (over the next ten years), development constraints and opportunities, and implementation capacity and resources, conforming to 760 CMR 56.03

(4) and the Guidelines (2014) set forth by the DHCD at the following link:
<https://www.mass.gov/files/documents/2017/12/22/hppguidelines.pdf> .

The proposal shall demonstrate the individual or firm has:

1. Proven experience with leading community engagement projects for housing plans, including workshops, focus groups, and survey administration;
2. Prior experience in the Minuteman Advisory Group on Interlocal Coordination (MAGIC) subregion of the Metropolitan Area Planning Council (MAPC), with previous work experience for or within the Town of Sudbury being most advantageous; and
3. Prior experience partnering with another organization on HPP preparation.

The Town seeks an engagement process that captures community input from a wide cross-section of stakeholders, and develops housing goals and strategies that respond to the HPP requirements established by the state's Department of Housing and Community Development.

The HPP shall identify obstacles and opportunities to developing affordable housing in Sudbury, including recommendations to overcome those obstacles and a map of possible housing development sites. The HPP shall consider the Town's current zoning and other local bylaws to identify possible amendments, as well as town-owned properties, which could help encourage redevelopment and a range of housing options that can help meet the needs of the local workforce, families, the elderly, and the disabled.

The HPP will integrate the findings of the housing needs assessment developed by the RHSO, along with community feedback compiled from workshops, focus groups, and a web-based survey (as well as any additional outreach mechanisms that may be identified and recommended by the responding Consultant). Based on the local housing needs and priorities that emerge from this process, the team will draft goals and strategies that can be implemented over the next five (5) years, including:

- Identification of sites for possible Local Initiative Program (LIP) and Chapter 40B development, including Town-owned land;
- Proposed amendments to local bylaws and zoning ordinances to support housing;
- Implementation strategies that indicate potential funding sources and responsible parties; and
- Prioritization of strategies, including a proposed timeline to help maintain "Safe Harbor".

The goals and strategies in the HPP shall address the matters set out in the State's DHCD's guidelines, including:

- A mix of types of housing, consistent with local and regional needs and feasible within the housing market in which they will be situated, including rental, homeownership, and other occupancy arrangements, if any, for families, individuals, persons with special needs, and the elderly;
- Plans to maintain Sudbury's "safe harbor" through 2030, including numerical goals (numerator) and development estimates (denominator);
- The identification of zoning districts or geographic areas in which the municipality proposes to modify current regulations for the purposes of creating Subsidized Housing Inventory (SHI) Eligible Housing developments to meet its housing production goal;
- Characteristics of proposed residential or mixed-use developments that would be preferred by the municipality (examples might include cluster developments, adaptive re-use, transit-oriented housing, mixed-use development, inclusionary housing, etc.);

- Municipally-owned parcels for which the municipality might issue requests for proposals to develop SHI Eligible Housing; and/or
- Participation in regional collaborations addressing housing development.

For the Community Engagement Services component, which is the focus of this RFP, the Town requires:

1. A web-based community survey.
2. A minimum of two (2) focus groups to supplement the findings from the survey process. The two (2) focus group meetings will be geared towards: 1) housing advocates and service providers and; 2) local developers, real estate brokers, and bankers.
3. Two (2) community forums or workshops – one (1) in-person or hybrid, and one (1) virtual.
4. Up to ten (10) meetings with the to-be-formed HPP Steering Committee, and attendance and presentation for final adoption by the Planning Board and Select Board.

Town staff will be available to assist with community outreach efforts and with GIS mapping tasks as needed.

III. Project Deliverables (Shall Include)

1. Compilation and analysis of the results from the web-based community survey, and the development of findings from the results.
2. A report regarding the findings from the minimum of two (2) focus groups and the community forums or workshops which can be incorporated into the Housing Production Plan.
3. A draft Housing Production Plan meeting the DHCD requirements outlined under the Scope of Services above.
4. A final Housing Production Plan meeting the DHCD requirements outlined under the Scope of Services above.

Deliverables shall be provided in digital (PDF) form and shall include formats (PowerPoint) suitable for public presentations.

IV. Proposal Submission Requirements and Deadline

- A. Letter of Transmittal – Should be signed by the individual authorized to negotiate for and contractually bind the proposer. The letter must state the offer is effective for at least sixty (60) days from the submission of the proposal or until it is formally withdrawn, or a contract is executed, or this RFP is cancelled. The proposal shall also disclose any potential conflict of interest.
- B. Qualifications – Describe the Consultant(s) and the proposer’s ability to successfully undertake the project technically, financially, and managerially. Include descriptions of similar work conducted elsewhere. If a team approach is proposed, indicate how the members have worked together on previous engagements.
- C. Methodology – Clearly describe the general work plan and methodology you would use to fulfill the Scope of Services. Include the range of outreach techniques to be utilized to engage the community.
- D. Staffing – Describe the Consultant(s) with the roles and responsibilities of each team member identified. Include capabilities of the proposed firm or individuals. Provide resumes and highlight staff members who will be directly involved in the project. Include experience in preparing community demographics, market needs assessments, and housing analysis.

- E. Project Timetable – The goal is to complete the Housing Production Plan update by January 2024 in order to submit the completed document for certification.
- F. Deliverable – Assist in delivering the draft Housing Production Plan update at a point in the project to be determined (but no later than January 15, 2024) and the Final Housing Production Plan at the completion of the contract. Consultant should also be available to meet with Town staff to review the draft as outlined in the Scope of Services.
- G. Additional Tasks – Identify any additional products, meetings, or recommendations that have not been specified in the Scope of Services but may be necessary to complete the project as defined.
- H. Budget – The estimated overall project budget is to be determined. The budget should delineate the cost for each of the following:
 - a) Personnel – Provide hourly rate for each individual who will work on the project.
 - b) Deliverables – As outlined in your work plan.
 - c) Travel Cost – If any.
 - d) Administrative Costs – Copies of reports, photographs, presentation boards, etc.
- I. References – The municipality/firm name, contact person, telephone number, and work description of all the projects for which the proposer has performed services similar to those described in the scope of work in the last five (5) years.
- J. Submission Deadline – **Consultants must submit two (2) hard copies and one (1) digital (PDF) of the technical proposal, which shall include a price proposal, by:**

Monday, March 20, 2023 at 12:30 PM to the attention of Adam Duchesneau, Director of Planning and Community Development, 278 Old Sudbury Road, Sudbury, MA 01776.

Proposals that are faxed or late will not be accepted.

The main envelope should be clearly marked PROPOSAL – Housing Production Plan Update with CONSULTANT NAME: _____

Included in the main envelope should be the Price Proposal Form, any associated price proposal documents, and all other requested materials (including the Certification of Non-Collusion and the Certification of Tax Compliance).

V. Evaluation Criteria

Each proposal will be evaluated on the following criteria. A Review Committee will determine whether the proposer’s response to a specific criterion is Highly Advantageous, Advantageous, Not Advantageous, or Unacceptable.

1. Number of years the proposer has been in operation,
2. Professional qualifications of staff who will work on the project (please include resumes of the project staff),
3. Experience in projects of similar size and scope (include the name of the entity, contact name, and telephone number for at least three (3) similar projects completed in the past five (5) years),
4. Ability to complete the previous project on budget and on time,

5. Commitment to complete this project in the specified time frame by providing information on your current work load,
6. Quality of proposal, and
7. References (must include all references which should be from individuals/firms/government entities that have hired the proposer for projects with a similar size and scope as this project conducted during the last five (5) years).

VI. Rule for Award

The Town of Sudbury will determine the most advantageous proposal from a responsible and responsive vendor by taking into consideration price and all evaluation criteria set forth in the RFP. A Review Committee will review and rank the proposals submitted in terms of their responses to the evaluation criteria. Then, the top two to four responses will be interviewed by telephone or Zoom. The Review Committee will then select a Consultant based upon all of the submitted information and the evaluation criteria.

The evaluation criteria are discussed in section V. Evaluation Criteria of the RFP.

The Town of Sudbury reserves the right to make any inquiries about the vendor to facilitate this process.

In these matters, the judgment of the Town will be binding, conclusive, and final.

Contract award will be made within sixty (60) calendar days after the date for receiving proposals. Proposals may not be withdrawn within that time except as provided by M.G.L. Chapter 30B.

VII. Town's Right to Reject Proposals

The Town of Sudbury reserves the right to reject any or all proposals if it is in the Town's interest to do so.

The Town may consider informal any proposal not prepared and submitted in accordance with the provisions hereof and may waive any informality or reject any and all bids, should the Town deem it to be in the Town's interest.

The Town may also reject proposals which in its sole judgment are incomplete, conditional, obscure, or not responsive or which contain additions not called for, erasures not properly initialed, or alterations or similar irregularities, or the Town may waive such omissions, conditions, or irregularities, if considered minor.

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under the penalties of perjury that this proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

The undersigned, by submittal of this Proposal, agrees, should the undersigned become the successful proposer, to all of the terms of the RFP specifications and accepts these terms as incorporated in a contract with the Town.

Name of Person Signing Proposal

Title

Name of Business

Business Address: _____

City, State, and Zip Code: _____

Telephone Number: _____ Fax Number: _____

Email Address: _____

Date: _____

Signature

CERTIFICATION OF TAX COMPLIANCE

I certify, under the penalties of perjury, that the below mentioned firm or person, to my best knowledge and belief, has complied with all the laws of the Commonwealth relating to taxes.

NAME/FIRM: _____

ADDRESS: _____

TELEPHONE: _____ DATE: _____

SIGNATURE OF AUTHORIZED OFFICIAL: _____

TITLE: _____

SOCIAL SECURITY or FEDERAL IDENTIFICATION #: _____

Approval of a contract, or other agreement, will not be granted unless the Applicant signs this certification form.

Your Social Security number or Federal Identification number will be furnished to the Massachusetts Department of Revenue (DOR) to determine whether you have met tax filing or tax payment obligations. The Town is required to furnish a list to the DOR at the end of its fiscal year, showing the vendors to whom more than \$5,000 is paid during the 12 months, ending June 30. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended. This request is made under the authority of Massachusetts General Laws, Chapter 62C, Section 49a.

PRICE PROPOSAL FORM

Base Bid:

State the Proposal Price in Numbers: _____

State the Proposal Price in Words:

Include a breakdown of itemized costs for each of the tasks as outlined in your work plan on a fixed fee basis. The budget should also delineate the cost for each of the following:

- Personnel – Provide the hourly rate for each individual who will work on the project.
- Deliverables – As outlined in your work plan.
- Travel Cost – If any.
- Administrative Costs – Copies of reports, photographs, presentation boards, etc.

NAME/FIRM: _____

ADDRESS: _____

TELEPHONE: _____ DATE: _____

EMAIL: _____

SIGNATURE OF AUTHORIZED OFFICIAL: _____

TITLE: _____