



MEMORANDUM

Town of Wellesley - Planning Department

To: Planning Board
From: Michael D. Zehner, Planning Director
Cc: Bob Kenney, Chair, Housing Development Corporation
Blythe Robinson, Executive Director
Meghan Jop, Deputy Executive Director
Tom Harrington, Town Counsel
Date: September 1, 2017
Subject: Development of Housing Production Plan; Review Draft RFP/RFQ

Please find attached a draft RFP for the development of a Housing Production Plan (this could also be developed as an RFQ). As previously suggested by the Board, this draft relied on the examples from Brookline and Southborough. The goal would be for the Board (or a designee) to approve the final language of the RFP at their meeting on September 18. The Board of Selectmen will likely discuss the language at their meeting on September 11.

Bob Kenney, as Chair of the Housing Development Corporation, was authorized by the Corporation to approve the final language of the RFP on their behalf. As part of this authorization, the Corporation also approved the use of up to \$20,000 of Inclusionary Zoning (payment-in-lieu) funds from the Affordable Housing Trust for the joint development of a Housing Production Plan with the Planning Board, with confirmed authorization for the use of these funds for this purpose by the Corporation's Counsel and Town Counsel. Sara Schnorr, as the Corporation's Counsel, has confirmed that this was an appropriate use of these funds, and Blythe Robinson has indicated that Town Counsel has agreed. It is my understanding that the Board of Selectmen will authorize the use of these funds at their meeting on September 11. Once authorized, up to \$35,000 will be available for the development of a Housing Production Plan.

DEVELOPMENT OF HOUSING PRODUCTION PLAN Request for Proposals



**Town of Wellesley Board of Selectmen
Ellen Gibbs, Chair**

**Town of Wellesley Planning Board
Deborah Carpenter, Chair**

**Wellesley Housing Development Corporation
Robert Kenney, Chair**

RFP Prepared by:

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**TOWN OF WELLESLEY
PLANNING BOARD AND HOUSING DEVELOPMENT CORPORATION
REQUEST FOR PROPOSALS
DEVELOPMENT OF HOUSING PRODUCTION PLAN**

1.0 INTRODUCTION

The Town of Wellesley, acting through its Board of Selectmen, Planning Board, and Wellesley Housing Development Corporation (“the Boards”) are seeking to engage a consultant (“the Consultant”) for the purposes of developing a Housing Production Plan (“HPP”) for the Town of Wellesley (“the Town”) consistent with the Guidelines dated December 2014 issued by the Department of Housing and Community Development (DHCD) under its regulatory authority established by 760 CMR 56.00. As expanded upon below, the Boards are deeply involved in this planning initiative and will partner to support the selected Consultant in preparing the Housing Production Plan.

1.1 BACKGROUND

The Town of Wellesley (incorporated in 1881), Norfolk County, is approximately 10 miles west of Boston. It is bordered by Natick on the west, Weston and Newton on the north and northeast, Needham on the southeast and Dover on the southwest.

In recent years, the Town of Wellesley has made a commitment to improving the amount of affordable housing located in the Town. Since 2004, the Town has adopted an Inclusionary Zoning Bylaw, adopted its 2007-2017 Comprehensive Plan (with numerous goals and objectives pertaining to the provision of affordable housing and diverse housing options), amended and adopted several Zoning regulations to support increased residential density and the development of affordable housing, and supported projects resulting in the development of approximately 130 SHI-eligible units. Despite these efforts, the Town's Subsidized Housing Inventory (SHI) remains below the 10% goal at approximately 6% (unofficially). This has resulted in the recent proposal of several “unfriendly” 40B proposals, 3 currently pending project eligibility totaling 151 units, and at least 4 additional conceptual projects discussed with Town officials. Accordingly, the Town is seeking to meet one of the certification thresholds to protect the Town from “unfriendly” 40B's, while at the same time developing a plan to guide the development of affordable housing to appropriate sites that complement the integrity of the Town's character.

The Town is therefore seeking to engage a Consultant to produce a Housing Production Plan in order to achieve three fundamental objectives:

1. Approval of a Housing Production Plan by the Planning Board, and ultimately the Board of Selectmen, the specific provisions of which will make it eligible for DHCD approval, implementation of which make it eligible for DHCD certification and achievement of a "Safe Harbor" status under Chapter 40B regulations;
2. Achievement of the 10 percent affordable housing goal under Chapter 40B definitions and standards; and
3. Expansion of the diversity of housing types available within the Town.

2.0 ACCESS TO MATERIALS

The Town of Wellesley Planning Department will make available all relevant public information pertaining to affordable housing in the Town. Such information includes, but is not limited to, the following:

- 2007-2017 Comprehensive Plan (i.e. master plan);
- Materials related to the ongoing development of the Town's Unified Plan (i.e. master plan update and Town-wide strategic plan);
- Information on potential affordable housing opportunities, including Town-owned sites;
- Zoning Bylaw and Zoning Map;
- Information (description, status) on current housing proposals including 40B applications; and
- Information regarding demolition permits and building permits for new residential buildings, by year, since 2009.

3.0 SCOPE OF SERVICES

The selected Consultant will be required to prepare and deliver a written HPP to the Town that is consistent with the December 2014 Guidelines promulgated by DHCD and meets the regulatory requirements for HPPs contained in 760 CMR 56. The Consultant shall comprehensively address each of the elements identified and expanded upon in the aforementioned DHCD Guidelines and undertake the following tasks specified below.

These tasks are intended to describe the general extent of services to be provided by the Consultant. This outline is not necessarily all-inclusive and the Consultant will include in the proposal any tasks or alternatives and services deemed necessary to satisfactorily complete the project. Consultants are encouraged to

bring both expertise and creative ideas tested elsewhere and tailored to Wellesley to help the Boards design the approach that best suits the Project.

The extent to which implementation strategies will be viable and effective will be determined in large measure by the extent to which the public accepts, concurs with, and supports the strategies. Public participation is a long-standing priority of the Town and a fundamental component of its government structure and operations. Therefore, the active and genuine involvement of all constituencies will be crucial in the ultimate success of the HPP. The Town is committed to insuring that the process is transparent and encourages the participation of all constituencies, particularly as it relates to the identification of public and private sites that are appropriate for affordable housing development.

The Consultant shall be available to meet periodically with a working group consisting of representatives of the Boards and staff of the Selectmen's Office and Planning Department. These meetings will be held during normal working hours and shall not exceed one per month. The Planning Department will administer the contract, be available to respond to questions on a daily basis, and provide administrative support in scheduling and coordinating both public and in-house meetings.

Task 1: Conduct a Comprehensive Housing Needs Assessment

The Consultant shall prepare an Affordable Housing Needs Assessment to understand who currently lives in the community, demographic trends affecting future growth, existing housing stock and future housing needs to establish a strategic plan for housing.

This should include:

- a. Review and analyze the existing 2007 to 2017 Comprehensive Plan and Unified Plan materials, and any previous studies and surveys, regulatory requirements, current census data, housing market information, site information and other pertinent housing-related materials;
- b. Prepare a draft Needs Assessment that estimates the current housing needs, and the housing needs for the Town's future population, taking into account regional and local growth factors. The projections should address the housing needs of the projected population at various income levels: not more than 30% AMI, more than 30% but not more than 80% AMI, and more than 80% but not more than 120 AMI, taking into account the likely family composition of such households;

- c. Review and determine development constraints and limitations on current and future needs due to zoning constraints, infrastructure, environmental/land constraints etc...and identify plans for the Town to mitigate such constraints to support development; and
- d. Identify the Town's infrastructure improvements needed to accommodate the current population and anticipated future growth, including plans for enlargement or expansion of existing infrastructure systems to ensure that both current and future needs are met. The infrastructure analyses should evaluate the capacity of water and sewer systems, roads, utilities, public transit, schools and any other public facilities that could impact or be impacted by future housing development.

Task 2: Develop Affordable Housing Goals

- a. Develop Affordable Housing Goals based on the Affordable Housing Needs Assessment that consider the types of housing most likely needed with consideration of fair housing obligations. What is the projected population of: working age? New household formation? Special needs? Elderly? Frail elderly? What percentage of these populations is projected to be at not more than 30% AMI? At more than 30% but not more than 80%? At more than 80% but not more than 120% AMI?
- b. Does the existing housing supply match the needs of these populations? Does the Town expect that there will be a range in housing types which will be affordable to each income group? The HPP must address a mix of types of housing, consistent with the community and regional needs that is affordable to households at not more than 30% AMI, more than 30% but not more than 80% AMI and more than 80% but not more than 120 AMI.
- c. The Affordable Housing Goals should provide for a range of housing, including rental, homeownership, and other occupancy arrangements that accommodate families, individuals, persons with special needs, and the elderly within the housing market in the Town.
- d. Determine a numerical goal for annual housing production, pursuant to which there is an increase in the Town's number of SHI Eligible Housing units by at least 0.50% of its total units during every calendar year included in the HPP until the overall percentage exceeds the Statutory Minimum. There should be a direct link between the setting of these goals and the results of the Needs Assessment. The numerical

goal should be based on the total year round number of housing units. The total year round housing units is the total number of units for the Town based on the latest U.S. Census including any changes due to demolition or new construction.

Task 3: Develop implementation strategies

- a. The HPP should include an explanation of specific strategies that the Town will use to achieve its housing projection goals as well as a time frame/schedule for achieving the housing goals. Each updated goal should include several specific milestones to indicate progress and include strategies such as the following:
 - i. Identification of zoning districts or geographic areas in which zoning needs to be modified for the purposes of creating SHI Eligible Housing developments to meet its housing production goal. Can density be increased? Can accessory apartments be accommodated? Are upper story residential units allowed in commercial districts?
 - ii. Identification of sites for which the Town could encourage the filing of a Comprehensive Permit application.
 - iii. Identification of characteristics of proposed residential or mixed-use developments that would be preferred by the Town e.g. infill development, cluster developments, adaptive re-use, transit-oriented housing, mixed-use development, and/or inclusionary zoning.
 - iv. Identification of Town-owned parcels for which the Town could issue an RFP to develop SHI Eligible Housing.
- b. Develop criteria to identify both private and Town-owned sites that would be suitable for development of affordable housing.
 - i. Facilitate a public meeting conducted by one or more of the Boards:
 - 1. Update, inform, and educate the public;
 - 2. Discuss general characteristics and/or potential criteria for site selection; and
 - 3. Solicit input
 - ii. Establish a range of criteria in response to public input (may

require prioritizing the criteria—at this stage or later—to facilitate site selection)

- c. Provide an update and explain criteria at a Board of Selectmen public meeting.
- d. Identify and examine public and private sites that meet (to varying degrees) the established criteria:
 - i. Facilitate a public meeting sponsored by one or more of the Boards to:
 - 1. Explain criteria; and
 - 2. Identify potential public and private sites in context of the established criteria.
 - ii. Select a preliminary list of specific sites that meet established criteria.
 - iii. Facilitate a public meeting conducted by one or more of the Boards to:
 - 1. Discuss relative merits and demerits of each site;
 - 2. Explain development constraints and limitations and possible mitigation measures of each site; and
 - 3. Provide affordable housing options for each site (various densities, mixed-use, etc.).
 - iv. Identify and examine strategies to encourage the production of affordable housing on identified sites
 - 1. Guide “friendly” 40B and/or LIP developments to suitable sites.
 - 2. Explore and examine alternative strategies to produce affordable housing, (rezoning, overlays, mixed-use developments, etc.)
 - 3. Examine the suitability of adopting 40R and/or 40S programs in Wellesley.
 - v. Prepare a timeline for housing production to meet goals and secure certification.
 - vi. Present preliminary findings to joint meeting of the Boards for public discussion.

- vii. Refine preliminary findings.

Task 4: Prepare and Present a Housing Production Plan

The Consultant shall prepare and present a final Housing Production Plan to a joint meeting of the Boards, and then to the Board of Selectmen for approval. Upon approval, the Consultant shall work with the Town to submit the approved HPP to DHCD. After submission to DHCD, the Consultant shall, in consultation with the Board of Selectmen, prepare any revisions to the HPP as recommended by DHCD.

4.0 PROJECT SCHEDULE

The Town is anxious to complete the development of an HPP as soon as possible given the escalating interest expressed by a number of private developers in pursuing 40B projects and the need to secure safe harbor protection from 40B projects that are inconsistent with local needs. It is preferred that the Consultant can complete its work within six months from the notice to proceed. However, each respondent must address the issue of project schedule in its response to this RFP and indicate if an alternative schedule is warranted and/or possible.

5.0 DELIVERABLES

The Consultant shall provide the following deliverables to the Town:

- Power point presentations for each of the public meetings identified above; and
- Twenty bound copies of the Housing Production Plan, including a separate stand-alone Executive Summary, in both written and electronic format.

6.0 PROPOSAL CONTENTS

6.1 PRICE PROPOSALS

The Consultant shall submit an estimated cost summary, **not to exceed \$35,000**, to provide the services required to fully complete the project. The Consultant must provide a breakdown of their cost estimate, either on an itemized basis (travel charges, hourly rates, responding to emails/phone calls, attending meeting, etc.) or on a per-report basis.

The Cost Proposal shall identify costs per task, including the fully burdened

hourly rate of each individual assigned to each task. If modifications are proposed to the Scope of Services, the costs of said modifications should be clearly identified.

6.2 NON-PRICE PROPOSALS

Consultants must respond in writing to all requirements of this RFP in the order of the items listed below. The Boards reserve the exclusive right to select or reject the Consultant(s) that it deems to be in the best interest to accomplish the project. Responses should reflect detailed consideration of the issues and opportunities presented. Any additional information that is believed to be relevant by the Consultant, but does not apply to the categories listed, should be added after the items listed below.

- a. Statement of Project Requirements.** State in succinct terms the Consultant's understanding of what is required by this RFP. This includes the Consultant's understanding of the needs, objectives and goals to be achieved, and the work involved.
- b. Response to RFP.** Describe in narrative form the Consultant's approach and technical plan for accomplishing the work listed in section 3.0 Scope of Services. The Consultant shall provide a detailed summary of how the project will be accomplished in accordance with above.
- c. Similar Experience.** Provide details of experience and past performance of the Consultant in the development of Housing Production Plans.
- d. Staff Experience.** If the Consultant anticipates utilizing staff, please describe in detail the staff that will be involved in this project. This includes their names, education, experience, and the expected amount of time they will be working on this project.
- e. Expected Time for Delivery.** Consultant shall discuss the estimated time anticipated to produce identified deliverables.
- f. Competing Commitments.** Consultants shall discuss the means by which adequate and timely attention to this engagement will be assured.
- g. References.** Provide the names, titles, and telephone numbers of three persons who can substantiate the Consultant's summary of qualifications and experience relevant to this project. Indicate the

linkage between the persons listed and the work mentioned in the “Similar Experience” section.

7.0 EVALUATION OF PROPOSALS

The Boards will use the following chart to rank each Consultant:

Statement of Project Requirements

Highly Advantageous	Consultant has a clear understanding of needs, objectives, and goals to be achieved, and work involved. Content is well presented and easy to understand.
Advantageous	Consultant does not make clear one or more details about the needs, objectives, and goals to be achieved, and work involved for this project.
Not Advantageous	Consultant does not clearly understand the needs of this project.

Response to RFP

Highly Advantageous	Consultant details their process, from beginning to end, and addresses each area of concern in section 3.0 in a manner that is easily understandable. Consultant addresses potential areas of concern with a well thought-out plan.
Advantageous	Consultant addresses everything required in section 3.0.
Not Advantageous	Consultant does not address one or more items in section 3.0.

Similar Experience

Highly Advantageous	Consultant responds to all aspects of this section while providing summaries of past projects with much similarity to the subject project.
Advantageous	Consultant addresses everything required in section while providing some similar examples of past projects.
Not Advantageous	Consultant does not address all areas in this section or does not indicate comparable past projects.

Expected Time of Delivery

Highly Advantageous	The Consultant agrees to present the HPP to the Board of Selectmen for approval within 7 months following commencement of the project.
Advantageous	The Consultant agrees to present the HPP to the Board of Selectmen for approval within 7 to 10 months following commencement of the project.

Not Advantageous	The Consultant agrees to present the HPP to the Board of Selectmen for approval more than 10 months following commencement of the project.
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Competing Commitments

Highly Advantageous	The Boards are thoroughly convinced that the Consultant's workload will allow working on the project to be a priority.
Advantageous	The Consultant has other projects it will be working on but the Boards conclude that the Consultant has allocated sufficient resources to complete the project in a timely manner.
Not Advantageous	The Boards are skeptical that the Consultant will be able to complete the project in a timely manner due to other current commitments.

References

Highly Advantageous	Consultant provides three or more references that are able to provide examples of the quality of services the Consultant provided to them.
Advantageous	The Consultant provides up to two references that are able to provide examples of the quality of service the Consultant provided to them.
Not Advantageous	The Consultant provides no references OR one or more references was not favorable to the Consultant.

The Boards reserve the right to approve any and all consultants under subcontract. Selection will be made on criteria set forth in this RFP. A contract will be negotiated with the selected Consultant. Should agreement not be reached, the Boards would then negotiate with the remaining consultants in order of their ranking until a suitable agreement could be reached.

The Boards reserve the right to discontinue the selection process at any time prior to the awarding of a contract. There will be no reimbursement to any candidate, for any reason, if selection is terminated. The Boards will determine the proposal that is most advantageous within 90 days of the due date.

8.0 PRE-AWARD CONFERENCE

The selected Consultant shall attend a pre-award conference with the Planning Director within one month after contingent selection as the successful Consultant. Contract documentation and the selected Consultant's proposal

shall be reviewed to assure precise understanding of contract requirements and to review the selected Consultant's proposal to accomplish all tasks.

9.0 PROPOSAL SUBMISSION

Price and non-price proposals must be in separate sealed envelopes as required by M.G.L. c. 30B. Please mark the price proposal with, "Price Proposal Housing Production Plan" and the non-price proposal with "Non-Price Proposal Housing Production Plan." Please submit ten (10) copies of each proposal and one CD or flash drive with digital copies of the Price Proposal and Non-Price Proposal.

Consultants must also fill out the Certificate of Non-Collusion and Bidder Information Response form at the end of this RFP and submit a copy with each non-price proposal.

The Non-Price Proposals will be opened and available for examination at **3:00 p.m. on MONTH #, 2017**. The pricing information will be opened by the Boards after the Non-Price Proposal evaluation as required by M.G.L. c. 30B.

The Boards maintain the authority to wave any minor informalities pertaining to proposal submissions by Consultants.

10.0 TOWN'S REPRESENTATIVE

The Town's coordinator responsible for coordinating actions and for responding to all questions will be Michael Zehner. His contact information is as follows:

Michael Zehner, Planning Director
(T) 781-431-1019 x2234
(E) mzehner@wellesleyma.gov

11.0 DUE DATE

Ten (10) copies of the proposals and one digital copy on CD are required, to be delivered on or before **MONTH #, 2017 at 3:00 p.m.** to:

Michael Zehner, Planning Department
Town Hall, Ground Floor
525 Washington Street
Wellesley, MA 02482

12.0 OWNERSHIP OF INFORMATION PROVIDED

All information provided by the Town to the Consultant and all material developed for this project shall be returned or delivered to the Town before final payment and will not be used by the Consultant for other purposes or released to others without permission of the Town.

The Consultant releases all rights to the deliverables to the Town and acknowledges that these research reports will be made available by the Town in the public domain.

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any 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.

Signature of person signing proposal

Date

Printed Name and Title

Name of Business

Bidder Information Response
Development of Housing Production Plan

Legal Name of the Bidder: _____

Company Name: _____

Company Address: _____

City State Zip: _____

Company Web Address: _____

Company Telephone: _____ Company Fax number: _____

State of Incorporation (Date): _____

If the bidder is a partnership, give full names and addresses of all partners; and if an individual, give residential address if different from business address.

Company Contacts - Required

Individual Submitting the Bid:

Name: _____ Title: _____

Mailing Address _____

Telephone: _____ Fax number: _____

Email Address: _____

Individual to be contacted about the Bid:

Name: _____ Title: _____

Mailing Address _____

Telephone: _____ Fax number: _____

Email Address: _____

Best Times to Contact: _____