

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 (“the Town”), acting through its Board of Selectmen, Planning Board, and Wellesley Housing Development Corporation (“the Boards”), is seeking to engage a consultant (“the Consultant”) for the purpose of developing a Housing Production Plan (“HPP”) for 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 HPP.

1.1 BACKGROUND

The Town was incorporated in 1881 and is located in Norfolk County, 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 east and southeast, and Dover on the south.

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 the *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 40B projects, the majority of which could be characterized as “unfriendly”: 4 currently pending project eligibility totaling 190 units, and at least 3 additional conceptual projects discussed with Town officials. Accordingly, the Town seeks to develop a plan to guide the development of affordable housing to appropriate sites that complement the integrity of the Town's character, while also working to meet one or more 40B certification thresholds to protect the Town from future “unfriendly” 40Bs.

The Town is therefore seeking to engage a Consultant to produce an HPP in order to achieve three fundamental objectives:

1. Approval of an HPP by the Planning Board, and ultimately the Board of Selectmen, the specific provisions of which will make it eligible for DHCD approval, and implementation of which will make it eligible for DHCD certification and achievement of a "Safe Harbor" status under Chapter 40B regulations;
2. Achievement of one or more the Statutory Minima (i.e. 10% affordable housing unit minimum, 1.5% land area minimum, etc.) 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, meets the regulatory requirements for HPPs contained in 760 CMR 56.00, and achieves the Town's fundamental objectives as stated above. The Consultant shall comprehensively address each of the elements identified and expanded upon in the aforementioned DHCD Guidelines and undertake the tasks specified below.

These tasks are intended to describe the general extent of services to be provided by the Consultant. This outline should not be considered all-inclusive and the

Consultant should include in the proposal any tasks or alternatives and services it deems necessary to satisfactorily complete the project. Consultants are expected to bring both expertise and creative ideas tested elsewhere and tailored to Wellesley to help the Boards design the approach that best suits the objectives of the Project.

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 ensuring 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 Town, demographic trends affecting future growth, existing housing stock, and future housing needs to establish a strategic plan for housing. Action items should include:

- a. A review and analysis of the existing *2007-2017 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. Preparation of a draft Needs Assessment that estimates current housing needs, and 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% of Area Median Income ("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 constraints and limitations on current and future needs due to zoning regulations, infrastructure deficiencies, and environmental constraints, and identify steps necessary to mitigate such constraints to support development; and
- d. Identify improvements and/or enhancements to the Town's infrastructure and services necessary to accommodate the current population and anticipated future growth, including plans for enlargement or expansion of existing infrastructure and services to ensure that both current and future needs are met. The infrastructure and services analyses should evaluate the capacity of schools, water and sewer systems, roads, utilities, public transit, public safety, and any other public facilities and services that could impact or be impacted by future housing developments and/or population growth.

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? Is there now or will there be in the future a range in housing types which will be affordable to each income group? The HPP must address a mix and diversity of housing types, consistent with Town 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.

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 or commencement of projects on sites achieving the annual land area minimum during every calendar year included in the HPP until the overall percentage exceeds the Statutory Minimum, as defined in the DHDC

Guidelines. There should be a direct link between the setting of these goals and the results of the Needs Assessment.

Task 3: Develop implementation strategies

- a. The HPP should include an explanation of specific strategies that the Town could use to achieve its housing production goals, as well as a time frame/schedule for achieving the housing goals. Each goal should include 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 housing production goals; for example, consideration should be given to whether density can be increased, whether accessory apartments can be accommodated, and whether upper-story residential units are allowed in commercial districts;
 - ii. Identification of sites for which the Town could encourage the filing of a 40B 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; and
 - v. Examples of best practice implementation strategies that have been successful in other Massachusetts municipalities.
- b. Develop criteria to identify both private and Town-owned sites that would be suitable for the development of affordable housing.
 - i. Facilitate a public meeting conducted by one or more of the Boards to:
 - 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 for site selection in response to public input (may require prioritizing the criteria, at this stage or later, to facilitate site selection).
 - iii. Provide comparative information as to how public meeting input compares to criteria for site selection used by other Massachusetts cities and towns.
- c. Provide an update and explain criteria for site selection at a Board of Selectmen public meeting, with all materials provided to the Selectmen at least three days in advance of the 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. Share research on the benefits and challenges affordable housing provides to a community;
 - 2. Discuss relative merits and drawbacks of each site;
 - 3. Explain development constraints and limitations and possible mitigation measures of each site; and
 - 4. 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; and
- 4. Offer recommendations on how to successfully market affordable housing opportunities to Town constituent groups.

- v. Prepare a timeline for housing production to meet goals and secure certification.

- vi. Present preliminary findings at a 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 HPP to a joint meeting of the Boards (with prior distribution of materials to all boards at least three days in advance of the meeting). Following this presentation, the Board of Selectmen shall consider approval of the HPP (at this meeting, or a subsequent meeting where the Consultant may need to be available for discussion and questions). 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 Boards have prioritized and endeavor to complete the development of an HPP as soon as possible given the escalating interest expressed by private developers in pursuing 40B projects in Town, and the need to secure safe harbor protection from 40B projects that are inconsistent with local needs. It is preferred that the Consultant is able to complete its work within twenty-eight (28) weeks 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:

- PowerPoint presentations for each of the public meetings identified above; and

- Twenty bound copies of the HPP, 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 the 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 Section 3.0.
- c. **Similar Experience.** Provide details of experience and past performance of the Consultant in the development of HPPs.
- d. **Staff Experience.** If the Consultant anticipates utilizing staff (including in-house and subcontract personnel), please describe in detail the staff that will be involved in this project, including each person's name,

education, experience, and 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 28 weeks following commencement of the project.
Advantageous	The Consultant agrees to present the HPP to the Board of Selectmen for approval within 28 to 40 weeks following commencement of the project.
Not Advantageous	The Consultant agrees to present the HPP to the Board of Selectmen for approval more than 40 weeks following commencement of the project.

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 may then elect to 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 two weeks 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 October 13, 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 or flash drive are required, to be delivered on or before **October 13, 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: _____