

TOWN OF WAKEFIELD



Request for Proposals

Housing Production Plan & Housing Needs Assessment

Planning Department

RFP 2024-01

PROPOSALS DUE: JUNE 21, 2024

Prepared by:

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Town Hall, 1 Lafayette Street, Wakefield, Massachusetts 01880

THE TOWN OF WAKEFIELD RESERVES THE RIGHT TO REJECT ANY OR ALL PROPOSALS.

1. Overview/Purpose

The Town of Wakefield, acting through its Community & Economic Development Department (hereinafter CED), seeks to secure consulting services to complete a Housing Production Plan (hereinafter “Plan”) and Housing Needs Assessment (hereinafter “Assessment”) required for approval through the Massachusetts Executive Office of Housing and Livable Communities (EOHLC) in accordance with the Guidelines found in 760 CMR 56.00. The previous Housing Production Plan and Housing Needs Assessment expired in 2020. The Town is seeking to continue its efforts in increasing affordable housing and meeting the housing needs of the residents through an updated plan as referenced in this RFP.

The ideal candidate will provide a separate proposal for each task: one, the Housing Needs Assessment, and two, the Housing Production Plan. The work shall be completed in two phases, rather than simultaneously, to allow the Assessment to guide the Plan. The proposal shall include a public engagement plan, regular progress meetings with staff, measurable milestones, a draft review process, and a final Plan that includes a presentation to the public. The Plan shall be equitable across all income levels, equally support all areas of Town, include a digestible and actionable Executive Summary, and marry the needs and desires of the residents with Best Practices for a Wakefield-specific approach. A detailed list is included in the *SCOPE* section of this RFP. The Town expects the Consultant to collaborate with CED, an advisory committee, and the public as community outreach and engagement is a crucial part of the housing plan process.

This effort is funded through a Housing Choice Grant from the EOHLC funding for Fiscal Year 2024-25 for a total of **\$79,000**.

2. Background Information & Current Efforts

The Town of Wakefield completed a Housing Production Plan and Housing Needs Assessment in 2015. While the Housing Production Plan has since expired, the Town has nonetheless been diligently working to make progress on the goals and objectives of the Housing Production Plan. Since the Plan’s adoption, it has guided efforts to increase affordable housing units, collaborate with developers, form an Affordable Housing Trust, establish a multifamily and mixed-use overlay district, and has create and permit 1,300 multi-family units since 2015, with around 450 of the units being affordable. Through these efforts, in 2023, the Town of Wakefield was designated by the state as a Housing Choice Community. This designation highlights Wakefield’s efforts in producing new housing and adopting best practices to promote sustainable housing development.

In 2015, affordable housing represented 6.01% of the town’s year-round housing stock. Currently, the Town of Wakefield has 1,001 units that meet the criteria for being listed on the State’s Subsidized Housing Inventory (SHI). This reflects 8.89% of the Town’s housing. Additional pending projects will add 157 new units, bringing the percentage to over 10%. While the Town may be close to meeting the State’s SHI minimums by the end of 2024, an updated Housing Needs Assessment will help guide future developments to maintain that percentage and meet the needs of residents.

The Town’s goal, through the guidance of the Housing Needs Assessment and Housing Production Plan, is to understand housing needs and barriers Wakefield faces and find ways to make progress addressing these issues. The Housing Production Plan shall offer an analysis of existing conditions and actionable steps to meet the concerns reflected in the Assessment. The Plan shall include an analysis of the existing conditions to determine regulatory and non-regulatory barriers to increasing not only the amount, but also the variety, of affordable housing available in the Town. This can include outlining a path for regulatory changes, such as, but not limited to, shifting the criteria for Accessory Dwelling Units, steps for the development of lots that don’t meet standard

minimum lot requirements, and/or designating a 40R district(s). The Housing Production Plan should especially consider addressing ways the Town can bolster its units that meet the needs of families and those with disabilities, including wheelchair designed units.

The Plan will provide concise, actionable steps to allow the Town to meet a variety of housing needs, beyond market rate housing, for both rental and ownership housing. The Plan shall specifically address affordable housing meeting up to 80% AMI, middle income units falling in the 80-120% AMI range, as well as Wakefield-defined attainable units at up to 200% AMI. The Plan shall explicitly denote if Wakefield has needs to reduce the AMI threshold to 60%, below the previous AMI breakdown categories of 80% AMI and 80-120% AMI and, if so, ways to address these housing gaps. The existing units on the SHI are a mix of primarily rental units with some ownership housing. The Town would like steps to encourage additional development of affordable ownership housing and support existing homeowners facing ownership difficulties such as maintenance issues. The Town seeks to have the Housing Production Plan layout steps to begin to address these deficiencies over the next five (5) years.

Community outreach, education, and participation are long-standing priorities of the Town and a fundamental aspect of its government structure and operations. The Consultant shall develop a plan and process that encourage participation of *all* constituents, including those who may not have been included in these conversations in the past. The Town is dedicated to engaging members of the public who have not traditionally been involved in governance. The Housing Production Plan process will include significant community outreach, education, and engagement, and as such the Consultant shall be prepared to collaborate with the public to define a community vision for housing.

The Community and Economic Development Department will administer the contract, be available to answer questions, and provide support for meetings, both with the public and in-house. The Consultant shall provide regular updates on the progress of the project to the Department and the advisory committee. The Consultant shall collaborate not only with the residents and end users of the Plan, but also the Town staff, Wakefield Affordable Housing Trust, and Wakefield Housing Authority. A successful bid will reflect an inclusive plan incorporating the needs of all parties. Public engagement and support are crucial to the ultimate success of a Housing Production Plan.

3. Existing Documents

[2015 Wakefield Housing Production Plan](#) & Related Materials

[Wakefield Master Plan](#) & Related Materials

[Vision 2030](#) & Related Materials

[Housing Choice Designation](#) & Related Materials

[Zoning Bylaws & Zoning Map](#)

Potential affordable housing opportunities, including a list of Town-owned sites

[Current Subsidized Housing Inventory](#), & Related Materials including pending projects

4. Scope of Services

Task 1: Develop a community input process & an advisory committee

- Advisory committee shall be appointed by the Town Council with guidance provided by the Consultant to ensure inclusion of a variety of stakeholders

- Create a timeline and plan for community input to identify and develop the needs, goals, and action plan strategies including, but not limited to:
 1. Focus groups of key stakeholders and community survey(s) to inform needs and possible strategies to address those needs
 2. At least two larger public forums/workshops to review draft goals and strategies, which the Consultant will design and facilitate
 3. Meetings with Town boards and committees, Wakefield Affordable Housing Trust, and Wakefield Housing Authority
 4. Interviews (in person and/or virtual) with residents facing housing challenges who are frequently not included in traditional stakeholder meetings, such as Section 8 recipients, public housing tenants, disabled individuals, and residents with limited English proficiency.
 5. Present final Plan to Planning Board for approval
 6. Present final Plan to Town Council for approval
- The Consultant shall provide translations of public meeting/workshop materials into Spanish and Portuguese.
- The public engagement strategy should be made accessible to the Town to use as a framework for continued housing conversations as part of the implementation of the Housing Production Plan.

Task 2: Housing Needs Assessment

SCOPE: The Housing Needs Assessment shall determine the housing needs and gaps of Wakefield residents over the next 10 years through gathering, utilizing, and summarizing available data including, but not limited to:

- Census, studies, plans, assessments, subsidized housing inventory, surveys, area incomes, demographic features, etc.
 - Local housing market analysis to include current rent prices, current sale prices, housing supply, etc.
 - Public and Town input (staff, Boards and Committees, and Affordable Housing Trust)
- The Housing Needs Assessment should explicitly identify housing needs, and gaps, of specific sub-populations within Wakefield, include rental and ownership housing for senior households, persons with disabilities, family households, and non-elderly rental housing for five (5) income categories: 30% AMI, 60% AMI, 80% AMI, 120% AMI and Wakefield-defined attainable housing <200% AMI.

Estimated Timeline for the Assessment

Any changes to this timeline shall be clearly explained in the proposal.

- Review existing data & conduct any additional research needed
- Prepare a draft Housing Needs Assessment meeting parameters as outlined above
- Submission of Final Draft for review and approval by Community & Economic Development, including a presentation to Planning Board by *September 1, 2024*

Task 3: Formulate Affordable Housing Goals

- The Consultant will work with the community, staff, committee, and relevant boards to create achievable, measurable goals to meet the five-year annual production goals required by HPP

Guidelines as well as to meet additional longer-term housing needs identified in the Housing Needs Assessment that span the next ten years.

- Goals shall focus on specific production goals for each of the following: extremely-low; low; moderate to middle- income households; and attainable housing as numerically outlined above to work toward closing gaps. Goals should also consider specific populations such as seniors, students, persons with disabilities, and family households and encourage the increased participation of racial and ethnic minority households.
- The Goals shall include an assessment of the 2015 Plan that were not fully realized and adjust as needed should they be incorporated into the new Plan.
- These goals shall be the foundation of the Plan and included in the Executive Summary.

Task 4: Housing Production Plan

SCOPE: The Housing Production Plan provides a framework for creating sustainable change in housing the Town's residents through objectives, actionable goals, and implementation strategies. Through research, meetings with Staff, meetings with the public, and guidelines from the EOHL, the Consultant shall formulate the updated Plan for Wakefield.

The Plan shall include:

- A detailed analysis of regulatory and non-regulatory constraints on, and opportunities for, the development of affordable housing along with recommendations to mitigate identified constraints or realize identified opportunities.
- Formulation of the affordable housing goals should address rental and ownership housing for low, moderate, and Wakefield-defined attainable housing.
 - Goals should also address rental and ownership housing gaps for specific sub-populations such as seniors, persons with disabilities, and family households.
- Any additional issues or concerns brought to light by the Assessment shall be explicitly addressed for remediation in the Plan.
- The Plan should also outline any at-risk affordable housing units, any units not previously identified, and programs to address potential ownership housing. Any action items that may require outside funding shall be clearly noted as such with options for funding along with how example programs have been funded in the past.
- A successful Plan shall unite the community-voiced concerns and hopes with Best Practices to create implementation strategies that have been successful in other Massachusetts municipalities.
- Any bylaws, ordinance, or regulation changes shall include examples of language from other Massachusetts municipalities as models.
- Steps for recertification at the four and a half (4 ½) year mark so as not to have an expired plan.

Deliverables & Milestones

- Specific milestones and schedule to be detailed in the Consultant contract pursuant to discussions with the CED staff/Town Administrator and the successful proposer. The Town seeks to have the project completed by **February 28, 2025**.
- The Consultant shall provide, along with the Plan, the following deliverables to the Town:
 - i. Presentations for each of the public meetings

- ii. Two (2) bound color copies of all reports produced, along with high-quality electronic copies of the same in a Microsoft Word version and a searchable PDF version.
- iii. A standalone Executive Summary in a Microsoft Word version and a searchable PDF version.
- The Consultant shall provide a copy, both in Microsoft Word format and searchable PDF, of the Executive Summary translated into Spanish and Portuguese.

All materials shall become the property of the Town of Wakefield.

5. Selection Criteria

1. Overview

Proposals will be reviewed by a Selection Group designated by the Town Administrator. The Group will evaluate each submission by applying the ratings “highly advantageous,” “advantageous,” “not advantageous,” or “unacceptable” to the criteria listed in EXHIBIT A to evaluate and rank the proposals. A composite rating will be assigned to each applicant based upon the ratings received in each category. Any applicant receiving a “not acceptable” in any category will be eliminated from the review process.

All information required in this RFP will be utilized in order to evaluate each proposal. Interviews and presentations may be offered to the firms submitting the more qualified proposals. Following evaluation of the technical proposals cost proposals will be opened and reviewed.

The Town reserves the right to reject any or all proposals, to waive any informalities in a proposal, or to reject the applicant’s choice of any sub-consultant or assigned staff if the awarding authority determines such actions to be in the best interests of the Town of Wakefield.

2. Comparative Evaluation Criteria (EXHIBIT A)

- The Town will award the contract to the Consultant offering the most advantageous response to this RFP, taking into consideration all evaluation criteria. The selection process will include an evaluation procedure based on the criteria in EXHIBIT A and may be required to appear for an interview.

6. Submission Requirements

Technical Proposal

▪ Project Approach

- Proposals shall include a description of the proposed approach for the Assessment and Plan, evidence of the firm/team’s understanding of the goals and objective of this project, and methodology for accomplishing the tasks as listed in the RFP.

▪ Project Schedule

- The proposal shall include a timeline meeting the milestones and deliverables as outlined previously in this RFP with the final Assessment and Plan submission being delivered on or before December 31, 2024.
- The Consultant shall submit a schedule for performance of the services to be provided in sufficient detail to demonstrate intent and ability to complete the project in the most efficient timeframe reasonable. Preference will be given in the evaluation process to applicants who

demonstrate the ability to meet the project's milestones, including robust community outreach and engagement, in the most efficient overall timeline.

- Experience with adhering to a proposed schedule shall be demonstrated through past projects.
- ***Project Team, Qualifications & Prior Experience with Housing Production Plans***
 - The ideal proposing firm/team will meet the following requirements:
 - The firm/project manager/team has at least three (3) years of experience in preparing housing production plans or other comprehensive housing plans. Successful completion of a minimum of three (3) such projects within the last five (5) years, and completion of five (5) overall is desired.
 - The firm/ project manager/ team has at least three (3) years of community engagement experience on projects of similar size and scope with a particular focus on equity and inclusion strategies focused on populations that are hard to reach.
 - The firm/team must have at least five (5) years of experience developing and/or implementing municipal housing policies.
 - The principal and project manager to be assigned to this project shall be available for meetings with the Town on days or evenings, as required.
 - The firm/team must have proven experience in the public and/or private sector and in working with municipalities, particularly planning and community development departments.
 - The firm/team shall have proven experience in marrying the needs and goals of the public with current Best Practices.
 - The volume of the proposed project managers and firm's current and projected workload must not adversely affect its ability to immediately initiate work and to follow through with the project in a timely and professional manner. The firm and all team members must be current staff members and capable of devoting a significant amount of time to this project in order to complete the work within the schedule outlined in this RFP.
 - Should the Consultant seek to subcontract any components of this RFP out, this shall be explicitly noted in the proposal. If any work is to be sub-contracted, the sub-contractor must be identified, as well as the services which will be performed by the sub-consultant. As part of the contract award of services, the Town reserves the right to approve or disapprove any and all such subcontractors. The Town reserves the right to approve changes in the project's staffing.
- ***Similar Experience***
 - The Consultant shall provide examples of similar projects by team members/the firm.
- ***Reference List***
 - A client reference list (at least three) with names, addresses, and telephone numbers of principal contacts of clients for whom the consultant has performed similar services in the past. A brief summary of similar completed projects and any other information deemed relevant to the project, and which the consultant believes will further the competitiveness of the proposal, including work samples from similar completed projects.
- ***Required Forms***
 - Signed Certificate of Non-Collusion (EXHIBIT B)
 - Signed State Taxes Certification (EXHIBIT B)

- Proof of insurance, including general and professional liability and Worker's Compensation insurance
- **Sealed Price Proposal (EXHIBIT C)**
 - The Consultant shall submit a sealed estimated cost summary, not to exceed **\$79,000** total, to provide the services required to fully complete the project. It shall include an itemized breakdown reflecting the expenses and hours required for each task of the two phases of the RFP, the Housing Needs Assessment and the Housing Production Plan. Should the consultant choose to modify the Scope of Services, the summary should explicitly reflect such changes. This shall be submitted in a sealed envelope with the consultant's information on the outside.

Modifications

Proposals may not be amended. To change a proposal, the original unopened proposal must be withdrawn, and a completely new proposal must be submitted in the required envelopes before the deadline. Proposals may be withdrawn at any time before the submission deadline.

7. Questions Regarding this Request for Proposals

Any and all questions shall be submitted in writing or email to the Town's Senior Planner at:

Samantha Elliott

Senior Planner, Town of Wakefield

1 Lafayette Street

Wakefield, MA 01880

OR

selliott@wakefield.ma.us (subject line: HPP RFP Questions)

8. Submission of Proposal and Deadline

Proposals are invited and will be received by the Planning Department, Town of Wakefield, William J. Lee Memorial Town Hall, 1 Lafayette Street, Wakefield, Massachusetts on or before 12:00 PM, noon, **June 21, 2024**. All Proposals received by this deadline shall be privately opened and reviewed by the Department. Finalists may be invited to attend an informational meeting/interview before the contract is awarded. Interviews shall take place in **June and, if needed, July 2024**.

All Proposals submitted shall be submitted as three (3) Hard Copies and 1 digital copy on a USB Drive formatted to searchable PDF or other accessible and searchable alternative. Price Proposals need only 1 copy submitted in a clearly marked *sealed* envelope.

EXHIBIT A

COMPARATIVE EVALUATION CRITERIA

Town of Wakefield Housing Production Plan RFP

All responsive proposals will be evaluated in the following areas based on comparative evaluation criteria for Highly Advantageous (HA), Advantageous (A), Not Advantageous (NA), or Unacceptable (U). An Unacceptable in any one criteria shall immediately eliminate a proposal from further consideration. A composite rating will then be determined. Proposals from contractors who meet or exceed the minimum criteria will be evaluated and rated on the basis of the below comparative criteria. The Town reserves the right to ask any respondent to provide additional supporting documentation in order to verify its response. Feedback gained from references may impact the rating in any applicable category

1. Staffing Plan, Schedule and Capacity

Highly Advantageous: The proposal presents a staffing plan with qualified team members representing the complete range of disciplines necessary to successfully execute the scope of services. The proposed schedule is reasonable and achievable and completes the project within the specified timeframe. The submittal demonstrates that all identified personnel have sufficient availability relative to their roles for the duration of the project.

Advantageous: The proposal presents a staffing plan with qualified team members representing the complete range of disciplines necessary to successfully execute the scope of services. The proposed schedule completes the project within the specified timeframe but does not adequately or reasonably correspond to the work requirements for one or more specific tasks. The submittal demonstrates the general availability of personnel for the duration of the project.

Not Advantageous: The proposal does not demonstrate qualified personnel necessary to execute the scope of services, or the proposed schedule does not complete the project within the specified timeframe or identified personnel do not have sufficient availability relative to their roles.

2. Qualifications of Project Team

Highly Advantageous: Respondent demonstrates that the project team and proposed team members possess superior training, educational background and direct work experience appropriate to the work described herein including general and strategic planning, zoning pertaining to affordable housing, and regulations, programs and available resources pertaining to the creation and development of affordable housing in Massachusetts.

Advantageous: Respondent demonstrates that the project team and proposed team members possess adequate training, educational background and direct work experience appropriate to the work described herein including general and strategic planning, zoning pertaining to affordable housing, and regulations, programs and available resources pertaining to the creation and development of affordable housing in Massachusetts.

Not Advantageous: Respondent demonstrates that the project team and proposed team members possess limited training, educational background and work experience appropriate to the work described herein including general and strategic planning, zoning pertaining to affordable housing, and regulations, programs and available resources pertaining to the creation and development of affordable housing in Massachusetts.

3. Depth of Experience in Preparing Housing Plans

Highly Advantageous: The proposal demonstrates substantive involvement by the project team and proposed team members on four (4) or more comparable or relevant projects within the past five (5) years, each resulting in the production of practical, creative and effective work products. At least one (1) of these projects involved the preparation of a Housing Production Plan approved by the MA Executive Office of Housing and Livable Communities (EOHLC; formerly known as DHCD). At least two (2) of these projects involved the preparation of similar comprehensive housing plans, one or more of which was for a community in Massachusetts and one or more of which was for Town of a size comparable to Wakefield.

Advantageous: The submittal demonstrates substantive involvement by the project team and proposed team members on two (2) or more comparable or relevant projects within the past five (5) years, each resulting in the production of adequate work products. At least two (2) of these projects involved the preparation of Housing Production Plans or similar comprehensive housing plans.

Not Advantageous: The submittal does not demonstrate substantive involvement on at least two (2) comparable projects within the past five (5) years; or none of the projects involved preparation of Housing Production Plans or similar comprehensive housing plans; or projects did not result in the production of adequate work products.

4. Analytical Capabilities

Highly Advantageous: The proposal demonstrates strong capabilities in analysis and presentation, demonstrating the ability to draw conclusions through the creative presentation and visualization of information that builds awareness and informs decision-making.

Advantageous: The proposal demonstrates adequate capabilities in analysis, synthesis, and presentation.

Not Advantageous: The proposal does not demonstrate adequate capabilities in data analysis, synthesis of data to draw conclusions, and presentation.

5. Responsiveness of the Proposal *including a demonstrated understanding of all project components and creativity in addressing housing topics and public outreach needs.*

Highly Advantageous: The proposal contains a clear, creative, and comprehensive plan that addresses all objectives and elements of the Scope of Work as stated in the RFP.

Advantageous: The proposal has a clear plan that addresses the objectives and elements of the Scope of Work as stated in the RFP.

Not Advantageous: The proposal needs to have a clear plan to address many objectives and elements of the Scope of Work as stated in the RFP.

6. Professional References

Highly Advantageous: Respondent has provided three client references for relevant projects, all of whom report highly satisfactory experience working with the respondent(s) with no major concerns expressed.

All references indicate a high degree of satisfaction with work products, and that project met budget and schedule expectations.

Advantageous: Respondent has provided three relevant client references, all of whom report satisfactory or better experiences working with the respondent and adequate work products. No major budget overruns or schedule delays attributable to the respondent were reported.

Not Advantageous: Respondent has not provided three or more relevant client references, or one or more references reported less than satisfactory experiences working with the respondent.

*If deemed necessary by the review committee, the Town may schedule interviews with the Consultants.
Interviews will be scored as follows:*

7. Interview (If conducted)

Highly Advantageous: The proposer's presentation was conducted by key individuals who will perform the services and included thorough, highly detailed information regarding how the Consultant will complete the scope of services. The presentation included multiple relatable examples of successful, similar projects conducted by the Consultant involving the proposed team members.

Advantageous: The proposer's presentation was conducted by some of the individuals who will perform the services and included adequately detailed information regarding how the firm will complete the scope of services. The presentation included at least one relatable example of a successful, similar project conducted by the Consultant.

Not Advantageous: Any of the following will result in an interview score of Not Advantageous: The proposer's presentation was not conducted by the individuals who will perform the services; or the proposer's understanding or ability to comply with the stated scope of services was not adequately demonstrated; or the presentation included no relatable examples of successful, similar projects conducted by the Consultant.

EXHIBIT B

CERTIFICATE OF NON-COLLUSION

Town of Wakefield
Housing Production Plan RFP

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 other person. As used in this certification, the work "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Name of person signing bid or proposal

Name of Business

CERTIFICATE OF TAX PAYMENT

Town of Wakefield
Housing Production Plan RFP

Pursuant to Massachusetts General Law Ch. 62C, Sec. 49A, I certify under the penalty of perjury that I, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support, as well as paid all contributions in lieu of contributions pursuant to MGL, 151A, section 19A(b).

Name of person signing bid or proposal

Name of Business

Social Security Number or Federal Identification Number

EXHIBIT C

PRICE PROPOSAL SHEET FOR PLANNING DEPARTMENT RFP #2024-01

Town of Wakefield
Housing Production Plan

BIDDERS NOTE: THIS FORM AND REQUIRED ATTACHMENTS, COMPRISING THE PRICE PROPOSAL, MUST BE SUBMITTED
IN A SEPARATE SEALED ENVELOPE CLEARLY MARKED "PRICE PROPOSAL"

CONTRACTOR: Town Administrator
Town of Wakefield
1 Lafayette Street
Wakefield, MA 01880

PROPOSER: _____

PROJECT: Consultant Services for the Housing Needs Assessment & Housing Production Plan

PROPOSED PRICE (in words): _____

PROPOSED PRICE (in numbers): _____

Please attach estimated budget and breakdown by planning element of professional service fees, assigned project staff,
and housing billing rates of staff.

Signed

Title

Print Name

Date Signed