# REQUEST FOR PROPOSALS (RFP)

**Housing Production Plan Update**

The Norfolk Municipal Affordable Housing Trust is requesting proposals from qualified individuals and firms for Consulting Services related to updating the Town of Norfolk’s Housing Production Plan of 2017.

A copy of the RFP outlining the requirements for submission is available online or from the Affordable Housing Director, at [sjacobson@norfolk.ma.us](mailto:sjacobson@norfolk.ma.us). For further information contact Susan Jacobson, Affordable Housing Director, at 508-440-2815 or [sjacobson@norfolk.ma.us](mailto:sjacobson@norfolk.ma.us). The proposal may be viewed and downloaded from the Town website [www.norfolk.ma.us.](http://www.norfolk.ma.us.)

Proposals are invited and will be received by the Affordable Housing Director, Town of Norfolk, Massachusetts on or before 2:00 PM, September 27, 2021 at the Affordable Housing Office/Town of Norfolk, One Liberty Lane, Norfolk, MA 02056. Proposals delivered after the appointed time and date will not be considered.

Three (3) copies of technical proposal and a USB drive with the technical proposal in searchable PDF format shall be submitted in a sealed envelope marked “Housing Production Plan Update” and three (3) copies of the price proposal in a sealed envelope marked “Housing Plan Production Plan Update - Price Proposal”.

The Town reserves the right to cancel any request for proposals, and to reject in whole or in part any and all proposals, when it is deemed in the best interests of the Town to do so.

Susan Jacobson

Affordable Housing Director

August 27, 2021

# \*Please see attached minimum Insurance Requirements to protect the Town of Norfolk in Contracts\*

# REQUEST FOR PROPOSALS HOUSING PRODUCTION PLAN UPDATE

Responses Due:  **October5, 2021** at 2:00 PM

Late Responses will be rejected

Deliver Complete Responses To: Susan Jacobson

Affordable Housing Director

One Liberty Lane

Norfolk, MA 02056

For Further Information Please Contact: Susan Jacobson

Affordable Housing Director

Email: [sjacobson@norfolk.ma.us](mailto:sjacobson@norfolk.ma.us)

# OVERVIEW/ PURPOSE

The Town of Norfolk, acting through its Norfolk Municipal Affordable Housing Trust, (hereinafter referred to as NMAHT), seeks proposals from firms/Consultants to complete an update to the 2017 Housing Production Plan, which will expire in October 2022.Specifically, NMAHT seeks the professional services from experienced firms qualified to complete an update consistent with the Massachusetts Department of Housing and Community Development (DHCD) guidelines for the development of a housing production plan (HPP). It is expected that the consultant will work with NMAHT.

This effort is funded by the Community Preservation Committee Fiscal Year 2022, for a total of $25,000.

1. **BACKGROUND INFORMATION**

The Town of Norfolk is governed by a three-member Select Board and Town Meeting. Daily management is vested in a Town Administrator appointed by the Select Board. Planning and development is controlled by Massachusetts General Laws (MGL), the Land Use Department, Norfolk Town Administrator, and the Town Bylaws. Overall, the Town has made progress toward meeting the production goals laid out in the 2017 HPP. But due to the significant numbers of units required by the HPP, the Town has not met the minimum 10% requirement under M.G.L. c. 40B. The Norfolk Municipal Affordable Housing Trust efforts were notable in helping the Town achieve its affordable housing production goals. However, the next five years could bring meaningful progress toward production and policy goals.

# SCOPE OF SERVICES

The Town of Norfolk seeks proposals from qualified firms/Consultants to assist in the update of the existing HPP consistent with the Massachusetts Department of Housing and Community Development (DHCD) guidelines. The Town seeks an updated plan that creates a vision and strategy for providing housing that serves a range of household needs, taking into account low- to moderate-income households, workforce housing, and market rate housing options. It also should address diverse housing needs for a range of household and housing types, which includes housing for seniors and families, as well as other prevalent household types to be identified.

# Housing Production Plan Update

The HPP update may include a combination of narrative, diagrams, maps, data tables, and other visual forms of communication to effectively convey concepts and data necessary to inform the public. At a minimum, the following components should be included in the plan:

* 1. A comprehensive housing needs and demand assessment based on current Census data, population trends, labor and workforce trends, and regional growth factors to determine future population and housing needs for a range of income levels. Analysis should at a minimum, include the following elements:
     1. Most recent available Census data of Norfolk’s demographics
     2. Housing stock, including census data, current M.G.L. Chapter 40B Subsidized Housing Inventory, building permits, and any other recently created housing studies
     3. Housing affordability across a range of household incomes
     4. Real estate trends and supply/demand analysis
  2. A detailed analysis of regulatory and non-regulatory constraints on the development of housing and plans to mitigate identified constraints.
  3. A review of 2017 housing vision and goals and update to ensure consideration of a mixture of housing types available to a range of income levels. The goals will also address fair housing requirements and accommodation for people with special needs.
  4. Strategies for achieving goals and an implementation plan.

Beyond the basic outline of a Housing Production Plan described above, the proposal should:

1. Include detailed Norfolk specific findings and recommendations on barriers and solutions to encourage the creation of new units under the existing Zoning Bylaw and/or other Town policies or regulations.
2. Identify other impediments, barriers, or inconsistencies, and/or unintended consequences with Norfolk’s zoning and other regulations that may prevent the creation of new units and propose corrective actions. The impediments and barriers are largely the same as identified in the 2017 HPP, so the update should focus on addressing the constraints that already exist and provide key actions on how to solve and/or address rather than restating the known constraints.
3. Present the document in a way that is equitable across all income levels. This includes ensuring that any recommendations and actions are not solely focused in one area. Recommendations should be tailored to address the needs of all income levels in Norfolk and include recommendations for zoning amendments to increase incentives for projects that may
4. incorporate recommendations.
5. Assess why the 2017 HPP implementation plan was not fully implemented and make adjustments for the future.

An important note: The NMAHT policy outcomes may be based on updated data and projections generated by MAPC as part of Metro-Common 2050, the new regional plan. The HPP should align both data and projections and policies and a combination of methods will be used.

# Public Meetings and Community Outreach

Due to the current pandemic and hesitancy to meet in public, it is likely that most, if not all, of the public meetings and community outreach will occur in a hybrid fashion. As the project progresses, this can be revisited if restrictions are changed.

The planning process will include community outreach and input to inform the needs analysis and develop the overarching vision and goals. A core objective of the HHP is to build a public process that serves the dual purpose of informing the public of the Town’s housing demands and needs and associated solution response, and to secondly build a strong constituency supportive of creating new housing.

We expect the firm/Consultant to design a public engagement strategy that is creative and engages with a variety of stakeholders and hard to reach populations as much as possible in order to meet our goals to provide an equitable and inclusive process. At a minimum, we expect to hold two public meeting sessions that are designed by the firm/Consultant and NMAHT Staff. We anticipate utilizing a hybrid meeting and focus groups. These are minimums to consider. Additionally, the outreach strategy cannot be an “off the shelf” strategy. The HPP update and its associated outreach will be a springboard for many housing related policies, plans, and outreach, including the efforts mentioned above. Therefore, the strategy that is developed as part of this project needs to be flexible in order to provide an overarching framework to consider how the Town will move forward relative to meeting its housing production goals.

# Staff Role

The Town of Norfolk staff - primarily from NMAHT - will be closely involved, but the firm/Consultant is expected to devote the time needed to conduct research, write documents, and participate in up to 3 meetings with NMAHT. Additionally, staff will take primary responsibility for scheduling meetings, posting notices for meetings, preparing meeting minutes, and attending all meetings. NMAHT Staff will provide any reasonably necessary baseline data, GIS data and layers, the existing HPP, Zoning Bylaw and Map, Master Plan, Town bylaws, and other town wide plans in progress or recently completed. The Town Planner/Affordable Housing Director will prepare updated demographic profile, housing characteristics, and development constraints analysis including environmental, infrastructure and regulatory constraints.

# PROJECT SCHEDULE

Work is expected to start in the fall of 2021. The goal is to have the NMAHT and Select Board adopt an updated Housing Production Plan by spring of 2022. The Consultant shall prepare a reasonable timeline to complete the project.

# DELIVERABLES

The Consultant will deliver two (2) copies of all reports produced, along with high-quality electronic copies of the same in a Microsoft Word compatible version and a searchable PDF version. All materials will become the property of the Town of Norfolk.

# CONSULTANT QUALIFICATIONS

At a minimum, the proposing firm/team must meet the following requirements:

* 1. The firm/project manager/team must have at least five (5) 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 is required, and completion of five (5) overall is desired.
  2. The firm/ project manager/ team must have 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.
  3. The firm/team must have at least five (5) years of experience developing and/or implementing municipal housing policies.
  4. The principal and project manager to be assigned to this project must be available for meetings with the Town of Norfolk on days or evenings, as required.
  5. 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.
  6. 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 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.

# SELECTION CRITERIA

The Town of Norfolk will award the contract to the firm/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 identified below. Finalists may be required to appear for an interview.

**CRITERIA:**

* 1. Staffing Plan, including the professional qualifications of all project personnel with particular attention to training, educational background, professional certification or registration, and professional experience. Demonstrated expertise and experience of the Principal-in-Charge,

Project Manager, other key personnel and any Consultants to be assigned to the Project including professional registration of the Consultants and their qualifications. The Plan of Services should be detailed and logical, and demonstrate efficiencies and creativity in completing the project.

***Highly Advantageous:*** The plan of services proposes a detailed, logical, creative, collaborative, and highly efficient scheme for producing a complete project that addresses all Goals and Priorities of this project and meets all the minimum applicant qualifications detailed in Section VI, “Consultant Qualifications”.

***Advantageous:*** The plan of services proposes a credible scheme for producing a complete project that addresses all of the required issues and meets all the minimum applicant qualifications detailed in Section VI, “Consultant Qualifications”.

***Not Advantageous:*** The plan of services is not sufficiently detailed to fully evaluate, or the plan does not contain all the components necessary to produce a complete project that addresses all of the required issues and meets all the minimum applicant qualifications detailed in Section VI, “Consultant Qualifications”.

***Unacceptable:*** The plan of services does not meet all the minimum applicant qualifications detailed in Section VI, “Consultant Qualifications”.

* 1. Depth of experience in the preparation of housing production plans and comprehensive plans, community engagement, and developing and/or implementing municipal housing policies.

***Highly Advantageous:*** The firm/Consultant has at least five (5) years of experience consulting with municipalities on projects of similar size and scope to this project. The Consultant can demonstrate the successful completion of five (5) similar projects within the last five (5) years.

***Advantageous:*** The firm/Consultant has at least four (4) years of experience consulting with municipalities on projects of similar size and scope to this project. The Consultant can demonstrate the successful completion of four (4) similar projects within the last five (5) years.

***Not Advantageous:*** The firm/Consultant has less than three (3) years of experience but more than one (1) year consulting with municipalities on projects of similar size and scope to this project. The Consultant can demonstrate the successful completion of two (2) similar projects within the last five (5) years.

***Unacceptable:*** The firm/Consultant has less than one (1) year of experience consulting with municipalities on projects of similar size and scope to this project. The Consultant cannot demonstrate the successful completion of similar projects.

* 1. Responsiveness of proposal, including a demonstrated understanding of all project components, creativity in addressing housing topics, and public outreach needs.

***Highly Advantageous:*** The response contains a clear, creative, and comprehensive plan that addresses all project Goals and Priorities as stated in the RFP.

***Advantageous:*** The response contains a clear plan that addresses most of the project Goals and Priorities as stated in the RFP.

***Not Advantageous:*** The response does not contain a clear plan to address many of the project Goals and Priorities as stated in the RFP.

***Unacceptable:*** The response does not contain any plan to address the project objectives stated in the RFP.

* 1. Strength and credibility of client references. The firm/Consultant shall demonstrate prior client satisfaction with working relationship, project management capabilities, and technical expertise in developing similar projects.

***Highly Advantageous:*** More than three clients who consider your services satisfactory or better. Projects were completed within budget and on schedule with minimal, insignificant delays.

***Advantageous:*** Three clients who consider your services satisfactory or better. One of the firm/Consultant's references indicates that the project was not completed within budget attributable to the firm/Consultant or with substantial delays attributable to the Consultant, and no current project or project completed in the last three years experienced substantial delays attributable to the firm/Consultant.

***Not Advantageous:*** Three or more clients not all of whom consider your services satisfactory or better. Two of the firm/Consultant's references indicate that the project was not completed within budget attributable to the firm/Consultant or was completed with substantial delays attributable to the firm/Consultant, and no current project or project completed in the last year experienced substantial delays attributable to the firm/Consultant.

***Unacceptable:*** Fewer than three clients who consider your services satisfactory or better, or three or more clients who consider your services unsatisfactory. More than two of the Consultant's references indicate that the project was not completed within budget attributable to the firm/Consultant or was completed with substantial delays attributable to the firm/Consultant.

# SUBMITTAL REQUIREMENTS

Interested qualified firms must submit their response addressing the objectives, scope and the schedule described in this RFP. Responses must include, at a minimum, each of the following:

* Three (3) paper copies of the technical proposal and a USB drive with the technical proposal in searchable PDF format shall be submitted in a sealed envelope marked “Housing Production Plan Update - Technical Proposal”.
  1. General description of the firm/team's experience.
  2. Description, with examples, of the firm/team's experience in working with municipalities or private clients to successfully create and implement housing plans and policies and engage the community in the process..
  3. A detailed scope of services for the proposed work, including the firm/team's general approach to such work, evidence of the firm/team's understanding of the goals and

objectives of the project and methodology for accomplishing the tasks as listed in this RFP.

* 1. An outline of the schedule for completion of tasks (timeline) as presented in the firm/team's approach to the scope of services.
  2. Description of or resumes for the assigned staffs’ experience, educational background, availability, and chain of responsibility, including the name and title of the principal and project manager assigned to the project, names of all sub-consultants, and resumes of all personnel to be associated with the project.
  3. At least three (3) references, including name, title, agency, address, description of project, project cost, and telephone number and the email address for clients with similar projects completed by the firm/Consultant within the last five years (including dates).
  4. Other pertinent information about the firm/Consultant that would aid the Town in making a selection.
  5. Completed Required Forms.
  6. Evidence of insurance coverage, including general and professional liability and Workers’ Compensation insurance.
* Sealed Submission, (3) three copies clearly marked “Housing Production Plan Update

Price Proposal”

1. Completed Price Proposal Form (attached)
2. Estimated breakdown by task of professional service fees (including expenses), assigned project staff and hourly billing rates of all staff assigned to provide services (including any sub-consultants).

Proposals must clearly address all the submittal requirements. The response should include a section addressing all of the minimum qualifications, the minimum submittal requirements, and each of the review criteria. The proposal will be reviewed based on each of these items and it will be to the benefit of the responder to clearly address each of the items. Where the requirements specify a minimum level of experience, indicate the dates of said experience.

The Norfolk Municipal Affordable Housing Trust along with the Town Planner will be convened to review proposals.

The Town reserves the right to reject any or all proposals, to waive any non- material irregularities or information in any RFP, and to accept or reject any item or combination of items. The Town also reserves the right to seek additional information and revised proposals prior to selection of a firm/Consultant through written notice to all of the respondents.

Responses to the RFP are due by 2 PM on October 5, 2021. Facsimile and/or emailed responses will not be accepted. All responses should be submitted to:

Susan Jacobson Affordable Housing Director

Town of Norfolk

One Liberty Lane

Norfolk, MA 02056

If necessary, any interviews with prospective consultants will be scheduled in October 2021.

# PROJECT FUNDING

Firms/Consultants must complete the attached Price Proposal Form under separate cover. Project fees must be provided for each Project Component of work as described in the Scope of Services. Fees shown will include all costs and expenses (copying, mileage, photographs, maps, etc.) to complete the Scope of Services defined in this RFP. Also, the selected firm/Consultant will be required to submit invoices identifying hours, expenses and total cost by specific tasks. The final contract scope, price and fee will be negotiated with the highest ranked responder.

# REQUIRED FORMS

All required forms must be submitted with the proposal.

1. Certificate of Non-Collusion
2. Certificate of Tax Compliance
3. Price Proposal Form

# CERTIFICATE OF NON-COLLUSION FORM TOWN OF NORFOLK

**HOUSING PRODUCTION PLAN UPDATE**

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 word “person” shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of Individual Submitting Bid or Proposal

Name of Individual Submitting Bid or Proposal

Name of Business

Date

BY STATE LAW THIS NON-COLLUSION FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

# CERTIFICATE OF TAX COMPLIANCE FORM TOWN OF NORFOLK

**HOUSING PRODUCTION PLAN UPDATE**

Pursuant to MGL Chapter 62C, Section 49A, I certify under the penalties of perjury that I have complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Social Security Number or Signature and Title of Individual or Federal Identification Number Responsible Corporate Officer

BY STATE LAW THIS CERTIFICATE OF TAX COMPLIANCE FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

# PRICE PROPOSAL FORM

**(To be place in a separate sealed envelope)**

# TOWN OF NORFOLK

**HOUSING PRODUCTION PLAN UPDATE**

CONTRACTOR Norfolk Municipal Affordable Housing Trust

Town of Norfolk

One Liberty Lane

Norfolk, MA 02056

PROPOSER

PROJECT: Housing Production Plan Update

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 hourly billing rates of staff.

Signed Title

Print Name Date Signed