Request for Proposals
TOWN OF FALMOUTH
Housing Demand Study

PURPOSE
The Town of Falmouth is seeking a consultant to conduct a Housing Demand Study for the Town. The purpose of this study is to establish affordable housing needs in Falmouth. The Town of Falmouth needs to better understand conditions and needs in the local housing market and how these affect the availability and creation of affordable housing. The intent is to develop a well-supported analysis, a rich database, and accurate projections for the next five years.

This information will be used to discuss and determine affordable housing programs and policies in the town. For this purpose and at the conclusion of this study, an Affordable Housing Roundtable is being planned by the Affordable Housing Coalition (AHC), the Falmouth Housing Trust (FHT), and the Economic Development and Industrial Commission (EDIC). It will be held in early 2013.

NEED FOR THE STUDY
The last documentation on local housing demand was the Falmouth Housing Needs Assessment prepared by consultant John Ryan for the Community Preservation Committee in 2007. This is now outdated, particularly because it was based on U.S. Census data from 2000 and 2006. The availability of 2010 census data will give the Town of Falmouth more current information as it formulates a vision for Falmouth’s future. In addition, the housing market and demand have changed. The national economic recession and housing crisis that started in 2007 have adversely affected the Falmouth economy. The economic downturn has increased housing foreclosures and evictions nationally and locally, significantly altering the local housing market.

The previous report does not address homelessness among young families as a dimension of the affordable housing problem in Falmouth. It also does not capture the number of non-deed restricted affordable rental units offered by private landlords. Marked demographic shifts are in process locally, and efforts to stanch the outflow of certain demographic groups have been unsuccessful. The Town of Falmouth needs to know exactly what it has for housing for various family sizes, age groups, special needs populations and income levels in order to effectively plan for sustainable growth and public services and to maintain a culturally vibrant and demographically diverse community over the next five years.

GOALS FOR THE STUDY
The project has several inter-related goals:
1. To provide an accurate account of the current supply and demand for affordable housing (deed restricted and non-deed restricted), for both rental and home-ownership units;

2. To project the future demand for affordable housing in Falmouth five years forward based on current data, identifiable trends, initiatives that could influence the need in the future (i.e. Open Cape), and other sources;
3. To provide the Board of Selectmen with accurate current information for their update to the Town of Falmouth’s Five Year Strategic Plan;

4. To provide material for a fact-based public discussion of affordable housing co-sponsored by the Affordable Housing Committee, the Falmouth Housing Trust, and the Falmouth Economic Development and Industrial Commission.

Respondents to this RFP will be asked to propose a Scope of Work that addresses these needs. The next section outlines the suggested elements of the Scope of Work.

**SCOPE OF WORK**

The Scope of Work prepared by respondents should at a minimum include the following tasks. Additional information and additional tasks are at the discretion of the proposer. Variations from the suggested elements will be considered in the comparative evaluations.

1. Meetings:
   a. A minimum of four (4) meetings with, the AHC;
   b. A meeting before the Selectmen to present findings and recommendations of the study;
   c. Participation in the Affordable Housing Roundtable being planned by the AHC, the FHT, and the EDIC.

2. A housing market analysis and needs assessment based on:
   a. Research of public records;
   b. Interviews and surveys;
   c. Other pertinent data;
   d. Professional analysis of the collected information.

3. A final report including:
   a. Projections of affordable housing supply and demand in Falmouth over the next five years;
   b. Recommendations for regulations, financial incentives and non-local collaborations to meet the demand for affordable housing over the next five years;
   c. Summary metrics of current and projected demands for affordable housing by family size, age, income and special needs categories.

**CONTRACT TERMS AND CONDITIONS**

If awarded the contract, the purchaser will execute a contract substantially the same as the approved scope of services submitted in the selected proposal.

**SUBMISSION REQUIREMENTS**

Consistent with the requirements of M.G.L., Chapter 30B, separate price and technical (i.e. non-price) proposals must be submitted.
Each proposal shall be reviewed by the Town to determine whether or not the following requirements have been satisfied:

**Technical Proposal Requirements**

1. **Narrative and Scope of Work**
   a. A narrative describing your understanding of the scope of work.
   b. The proposer’s technical approach; identifying tasks, products and meetings that explain how the proposer will address each of the required elements of the Scope of Work. Additional tasks and modifications of the required elements should be fully explained.
   c. A time schedule for completing the scope of work, including interim products and meetings.

2. **Statement of Qualifications**
   a. Background on the firm including previous comparable projects.
   b. Identification of the project team, the management structure of the team, and the role of each member relative to the Scope of Work.
   c. A statement on the qualifications of all project team members with resumes attached.
   d. At least three references from projects of comparable scope.

3. **Forms**
   a. Attach a completed Standard Certificate of Non-Collusion.
   b. A certified statement by the authorized representative of the proposal that all requirements of the fee proposal (see below) have been met and have been submitted under separate sealed cover.

4. **Submission Requirements**
   a. The technical proposal should be submitted under sealed covered, clearly marked “ATTENTION: Technical Proposal – Housing Demand Study” on the envelope.

**Price Proposal Requirements**

Under separate sealed cover, clearly marked “ATTENTION: Price Proposal – Housing Demand Study” on the envelope, the proposal shall submit a fee for all labor, deliverables, and indirect costs as a fee per task and a total fee for the complete Scope of Work. Contract is anticipated not
to exceed $30,000.

**Interpretation of Request for Proposals**

No oral interpretations will be made to any proposal as to the meaning of any requirements specified within this Request for Proposals. Every request for such interpretation shall be made in writing and addressed to the attention of:

Deborah Converse, Preservation Planner  
Falmouth Town Hall  
59 Town Hall Square  
Falmouth, MA 02540  
dconverse@falmouthmass.us

**Deadline for Submission**

Complete submittal of the separate Technical and Price proposals shall be received by the Town no later than 4:00 pm Friday, November 9, 2012

**Address for Proposal Submissions/Number of Copies**

Submissions shall include five hard copies and one electronic file in pdf format submitted on transferrable media or sent by email to: dconverse@falmouthmass.us. The hard copies and any file on transferrable media are to be delivered to:

Office of the Town Manager/Selectmen  
Falmouth Town Hall  
59 Town Hall Square  
Falmouth, MA 02540  
Attn: Community Preservation Planner

NOTE: Proposals or any parts thereof received after the time and date stated above will be rejected as non-responsive to this Request. Faxed proposals will not be accepted. Delivery of any proposals to any other Town office will not constitute receipt by the Town. It is the sole responsibility of the proposal to ensure that proposals are received at the proper location prior to the stated deadline. Information submitted separately will not be considered.

**Proposal Corrections, Modifications, and Withdrawals**

Prior to the date of the opening of technical proposals, proposers may correct, modify, or withdraw their proposals. Any correction or modification must be submitted in writing in sealed envelopes, clearly marked to indicate whether the technical or cost proposal is being changed, and including the same number of copies as the original submission. Requests for withdrawals must also be in writing. All proposals and cost amounts will be considered firm and may not be withdrawn for a period of sixty (60) days from the date of the technical proposal opening unless
stated otherwise.

The Town reserves the right to waive any information or to reject any or all proposals if it deems it to be in the public interest to do so.

**PROPOSAL EVALUATION PROCESS**

**Screening Proposals for Compliance with Submission Requirements and Minimum Evaluation Criteria**

Utilizing the proposal submission requirements and the minimum criteria incorporated herein, the Evaluation Committee, to be designated by the Chief Procurement Officer, shall screen proposals as to their responsiveness. Any proposal which, in the opinion of the Evaluation Committee, fails to include the information or documentation specified in the submission requirement shall be determined to be non-responsive and shall be rejected. Any proposal which fails to meet any of the standards set forth as minimum criteria shall be determined to be non-responsive and shall be eliminated from the competition.

**Interviews**

Finalists will be interviewed by the Evaluation Committee.

**Minor Informalities**

The Evaluation Committee shall waive minor informalities as defined by Chapter 30B, or allow the proposer to correct them.

**Use of the Comparative Evaluation Criteria**

The remaining proposals shall be evaluated using the comparative evaluation criteria incorporated herein. Each proposal shall be assigned: a) a separate rating for each comparative evaluation criterion; and b) a composite rating. Proposal ratings and accompanying written explanations shall be forwarded to the Chief Procurement Officer.

**Methodology for Determining Best Proposal**

Taking into consideration the Price Proposal and the evaluations of the Evaluation Committee, the Chief Procurement Officer shall determine the most advantageous proposal.

**SELECTION CRITERIA**

The final selection of a consultant shall be based on the following set of criteria:

**Minimum Evaluation Criteria**
a. Submission of all required documentation.
b. Receipt of satisfactory responses from all references confirming project team’s technical competence and completion of work in a timely manner.
c. Demonstration that all professional members of the project team have appropriate professional and academic credentials and have prior experience with housing demand and affordable housing policy studies.
d. The finalist should be prepared to start the project within 30 days of being selected.

**Comparative Evaluation Criteria**

The criteria that will be used for comparative evaluations are:

1. **Demonstration that the proposer understands the project needs and scope of work.** [25 pts]

2. **The quality of the technical approach and the extent to which the proposed Scope of Work:** [30 pts]
   a. Results in a clear understanding of local affordable housing needs.
   b. Provides usable documentation, including an extensive, comprehensive and updatable database and implementable recommendations.
   c. Is creative and cost effective in development of the information.
   d. Schedules the conclusion of the study to coincide with the Roundtable.

3. **Prior experience with housing demand studies and the success of affordable housing policy recommendations in other communities.** [25 pts]

4. **Quality of references, especially from similar municipal clients and timeliness of performance.** [10 pts]

5. **The ability of the project team to perform the scope of work.** [10 pts]
TOWN OF FALMOUTH
HOUSING DEMAND STUDY CONSULTANT

PRICE PROPOSAL FORM

____________________________________, doing business at:
Name of Firm or Individual

____________________________________
Street Address

________________________   __________  __________
City or Town          State          Zip Code

____________________________________
Designated Contact Person  Telephone Number

____________________________________
E-mail Address  Facsimile Number

Hereby proposes to provide Housing Demand Study consulting services for the Town of Falmouth as described in the attached Request for Quotes for the following total fee

$__________________.

________________________   __________________
Signature  Date

Fee Proposals should be separately sealed and clearly marked on the envelope “Cost Proposal”. All proposals should be submitted to:
Office of Town Manager / Selectmen
Cost Proposal: Housing Demand Study
59 Town Hall Square
Falmouth, MA 02540

July 26, 2012
CERTIFICATE OF NON-COLLUSION

The undersigned hereby certifies that the bid, proposal and agreement have 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.

Executed under and as a sealed instrument this _____ day of _________________2012.

Respectfully submitted,

________________________________________
(Name of bidder)

________________________________________
(Signature)

________________________________________
(Type name and title)

Date: __________
TOWN OF FALMOUTH

STATE TAXES CERTIFICATION CLAUSE

I certify under the penalties of perjury that I, to my best knowledge and belief, have filed all state tax returns and paid all state taxes under the law.

___________________________________________  By: ______________________________
* Signature of individual or Corporate Officer
Corporate Name (Mandatory) (Mandatory, if applicable)

_________________________
**Social Security # (Voluntary)
or Federal Identification #