CARLISLE HOUSING AUTHORITY
REQUEST FOR PROPOSALS FOR THE
GROUND LEASE OF PROPERTY LOCATED AT 338
BEDFORD ROAD, CARLISLE, MASSACHUSETTS AND
THE DEVELOPMENT THEREON OF
AN AFFORDABLE GROUP HOME DUPEX FOR
INDIVIDUALS WITH INTELLECTUAL DISABILITIES

Members of the Authority
Alan P. Lehotsky, Chair
Carolyn Ing, Treasurer
Mark Levitan, Secretary
Steven Pearlman, CPC Committee Representative
W. Randall Brown, Member

Date Issued: December 3, 2014
Due Date for Responses: Wednesday, January 28, 2015. Applications will be accepted no later than NOON, at Carlisle Town Hall, Town Administrator’s Office, 66 Westford Street, Carlisle, Massachusetts. LATE PROPOSALS WILL NOT BE ACCEPTED.

This Request for Proposals was developed in accordance with the requirements of Massachusetts General Laws Chapter 30B, Section 16.
CARLISLE HOUSING AUTHORITY
REQUEST FOR PROPOSALS FOR
THE GROUND LEASE OF PROPERTY LOCATED AT 338 BEDFORD ROAD,
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INTELLECTUAL DISABILITIES

Table of Contents

1. Request for Proposals
2. Property Description
   2.1 Town of Carlisle
   2.2 Community Character
   2.3 Population/Demographic Change
   2.4 Housing Characteristics
   2.5 Site Information
   2.6 Zoning
3. Development Guidelines
   3.1 Programmatic and Use Guidelines
   3.2 Design Guidelines
   3.3 Schedules
4. Developer Submission Requirements
   4.1 Submission Process
   4.2 Pre-submission conference
   4.3 Submission Enclosures
   4.4 The Development Team
   4.5 Development Concept
4.6 Preliminary Plans
4.7 Implementation Plan and Project Timetable
4.8 Management Plan
4.9 Financial Proposal & Business Terms
4.10 Project Financing & Financial Analysis
4.11 Financial Qualifications

5. Review and Selection Process
5.1 Level 1 Threshold Review Process
5.2 Level 2 Competitive Evaluation Process
5.3 Conditions, Terms and Limitations
5.4 Selection Process

Appendices

A. Directions to Town Hall, 66 Westford Street, Carlisle, MA 01741

B. 2014 Massachusetts Area Planning Council Carlisle Profile, 2010 United States Census Data for the Town of Carlisle and 2008-2012 American Community Survey Data for the Town of Carlisle

C. 2010 Town of Carlisle Housing Production Plan Executive Summary

D. 338 Bedford Road Surveyor’s Map

E. Site Context

F. 338 Bedford Road Parcel, Carlisle Deed

G. Area to be Leased - 338 Bedford Road


I. 338 Bedford Road-Carlisle, MA MASTER PLAN FINAL REPORT, April 11, 2014
J. 1980 Town Meeting vote to purchase Fox Hill property and 1974 Town Meeting vote to purchase Banta-Davis property. Fox Hill Trail map.

K. Site Feasibility and Approval to Occupy for the Home and Site Based Respite Services

L. Residential Development Form

M. Current Workload Form

N. Beneficial Interests Form

O. Tax Compliance Form

P. Non Collusion Form
1. Request for Proposals
1.1 Introductory Instructions

The Carlisle Housing Authority ("Authority") is issuing this Request for Proposals ("RFP") to invite proposals from qualified developers to enter into a long-term lease of an approximately 1.36-acre piece of property located at 338 Bedford Road (the "Property") and the development thereon of two connected group homes with nine (9) bedrooms total of rental housing. The purpose of this Request For Proposals ("RFP") is to identify and select a developer for the Development that will provide quality affordable housing for Department of Developmental Services ("DDS") residents, in accordance with DDS guidelines, from Carlisle and from surrounding areas.

The preparation of the RFP response shall be at the expense of the respondent. It is the sole responsibility of the respondent to fully examine this RFP’s attachments and referenced documents. Questions shall be addressed in writing to Timothy Goddard, Town Administrator, Carlisle Town Hall, 66 Westford Road, Carlisle, Massachusetts 01741 by January 19, 2015. Answers to such timely submitted questions will be in writing and the questions and answers will be shared with all those on record as having received a copy of the RFP.

A Pre-Submission Conference will be held at 10 a.m. December 17, 2014 at the Carlisle Town Hall. A locus map and directions to this location are included in Appendix A. The Authority is not requiring all respondents to attend this Conference; however, all potential respondents are strongly encouraged to participate.

One (1) original and five (5) copies of the proposal shall be returned in a sealed envelope clearly marked “Authority, 338 Bedford Road Group Homes Proposal” on the outside of the envelope to:

Mr. Timothy Goddard
Town Administrator
Carlisle Town Hall
66 Westford Street
Carlisle, MA 01741

All proposals must be submitted by NOON January 28, 2015, when they become the property of the Authority and are subject to applicable Public Record Laws. Late proposals will not be accepted.

Respondents to the RFP will be able to correct or modify their proposals before the deadline for submittal, but must submit one (1) original and five (5) copies of any modifications or corrections in writing to the above contact person and address prior to the RFP deadline. Respondents may also withdraw their proposals at any
time during the application and selection process. Moreover, the Authority reserves
the right to reject any and all proposals or to cancel the RFP as it is determines to
be in the best interest of the Town of Carlisle and the Authority.

The Authority makes no representations or warranties, expressed or implied, as to
the accuracy and/or completeness of the information provided in this RFP. For
more details on the Request for Proposals Submission and Selection Process see
Section 5 of this RFP.

It will be the responsibility of the selected developer to determine the applicability
of and ensure compliance with any and all laws that may apply to the Project
(including, but not limited to any applicable public construction and/or fair wage
laws).

1.2 Introduction to the Project
The Authority is pleased to present this RFP for the long-term lease of the Property
and development thereon of a Duplex Group Home for Individuals with Intellectual
Disabilities that contains nine (9) bedrooms of rental housing for individuals with
intellectual disabilities. This RFP offers an opportunity to create a high-quality
affordable group home housing in the Town of Carlisle on part of the site, which is
at the front of the Property. The well and the septic system for both group homes
must be located on the Property. The proposed group homes, septic system and
well shall hereinafter be referred to as “the Development.”

The Property is located at 338 Bedford Road, Carlisle, Massachusetts. At the 2012
Carlisle Special Town Meeting and Special Town Election, the Town authorized a
debt exclusion bond for the purchase of a five-acre parcel located at 338 Bedford
Road by the Town of Carlisle Affordable Housing Trust (“Trust”). In May 2013, the
Trust purchased the entire five-acre parcel. At the 2013 Carlisle Annual Town
Meeting, the Town appropriated $67,500 of Community Preservation Act (“CPA”)
funds for the development of a Master Plan study and for other studies needed for
the development of individuals with intellectual disabilities group homes on the
property. The property is bounded by the Town-owned Banta-Davis land to the
west and by a commercial business and residential properties to the north, by the
Town-owned Fox Hill Conservation land to the east, and by residential properties to
the south.

The deed to the Trust is recorded in Middlesex North Registry of Deeds Book 27261
Page 256. An affidavit correcting a typo in the property address shown on the
Deed was recorded at Book 27440, Page 38. A copy of the Town Meeting Vote
appears as Exhibit A.

Commencing on June 30, 2014, the Trust leased an approximately 1.36 acre
portion of the property to the Authority for a 99-year term, to permit the Authority
to enter into a sublease and development agreement with a developer to construct
and operate an affordable group home for individuals with intellectual disabilities.
The notice of lease is recorded with the Middlesex North Registry of Deeds in Book
28280, Page 211.
The Authority’s objective for Property is to ensure the development of two (2) connected group homes for developmentally disabled adults. The Authority’s second objective is that the development of the property be well-designed and in keeping with the high quality of residential neighborhoods in Carlisle. As such, the Town has broadly planned a development that meets the Town’s goals for producing and providing group homes while minimizing adverse impacts on environmental quality and the surrounding neighborhood.

The Authority’s plan to develop two (2) connected group homes for disabled adults on the 338 Bedford Road property was based upon community input, research and an extensive decision-making process that began in 2007 with the invitation of the DDS Area Director to a joint Carlisle Housing Authority and Affordable Housing Trust meeting, and has evolved to hiring an architecture design consultant to conduct a Master Plan Design effort for the 338 Bedford Road property in 2013.

During this period, the Authority made numerous site visits to group homes funded by the DDS, met with senior DDS staff, sought out Town-locations, and discussed funding models with the state agencies. In addition to site visits, the Authority worked collaboratively with the Authority and the Board of Selectmen. It also has held a community meeting where a neighboring housing official was invited to discuss their communities’ success with group home development.

In 2013-2014, as part of the Master Plan Design effort, information was collected and feedback was sought in the two Master Plan Design charrettes, which were held in fall of 2013. Charrette participants included members designated as representatives from the Affordable Housing Trust, the Housing Authority, the Recreation Commission, the Planning Board, the Council on Aging, the Board of Health, and the Conservation Commission. Presentations were made by the consultant designers to the Planning Board, the Housing Authority, the Board of Health, the Conservation Commission, and the Board of Selectmen.

The Authority will now select a developer to prepare a more detailed plan, acquire a long-term lease on the 338 Bedford Road property from the Authority, and then develop housing, all consistent with the Town’s goals and guidelines. The Authority expects to enter into a long-term lease with the selected developer under agreed upon terms which will require general and reasonable conformance and long-term affordability of the housing that is produced.

The Property is located in a residential neighborhood, current zoning allows multi-unit homes developed by non-profits for educational purposes. The preferred development scenario for the Property is a duplex group home with four bedrooms in one unit and five bedrooms in the other unit, each to meet state affordability guidelines targeted to those earning at or below 80% of area median income. It is the intention of the Authority, the Trust and the Town to maximize the affordability of these proposed group homes to the greatest extent possible.

Proposals to lease and develop the Property must be received by the Authority at the Town Administrator’s office at 66 Westford Street, Carlisle, MA 01741, no later than NOON, January 28, 2015. Telecopied or electronically sent proposals will not
be accepted. Refer to Section 4 of this RFP for the proposal submission requirements.

The Authority makes no representations or warranties, express or implied, as to the accuracy and/or completeness of the information provided in this RFP. This RFP (including all attachments and supplements) is made subject to errors, omissions, prior sale, lease or financing, and withdrawal without prior notice, and to changes to, additional, and different interpretations of laws and regulations.

Prospective developers should undertake their own review and analyses concerning physical conditions, environmental conditions, applicable zoning, required permits and approvals, reuse potentials, and other development, ownership and legal considerations.
2. Property Description

2.1 TOWN OF CARLISLE

First settled in 1650, Carlisle was twice a district before becoming a Town. The first district was formed in 1754, entirely from the northerly part of Concord; but because the inhabitants could not agree on the location for building a meetinghouse for religious worship, the territory was returned to Concord in 1756.

In 1758, Timothy Wilkins gave 1.5 acres of land for building such a meetinghouse, which was erected in 1760 just northwest of the present First Religious Society in Carlisle Center. This was the spark needed to establish the second district of Carlisle during the Revolution on April 28, 1780 from portions of Concord, Acton, Chelmsford, and Billerica. At that time there were ninety dwellings and one hundred two families. Early industries other than farming included grist, fulling (mica) and saw-mills. Later granite and copper mining came to the Town in addition to the cranberry bog on Curve Street.

In its first years, the district raised twenty-six men for the Continental Army. Considerable quantities of beef and clothing were furnished to support the county in its Revolutionary struggle. In 1812, the Town again responded to the call for men for the military forces. The monument in the center of Town (the marble statue of the Goddess of Liberty) was erected in memory of the soldiers of the Civil War. On the common stands an honor roll with the names of those Carlisle residents who served our country in more recent conflicts.

On February 18, 1805, the Town of Carlisle was incorporated. Although the population of Carlisle has quintupled under the pressures of suburban growth in the years since the Second World War, the Town today still retains its New England village charm, with its historic landmarks and its Town Meeting form of government. ¹

2.2 Community Character

Today, Carlisle is a beautifully scenic community. The community takes great pride in its scenic vistas and landscape, which includes woods, a river and streams. It is a community of farms, residences and small businesses. As far as employment, its residents primarily commute to work to nearby suburbs, the Town has 700 employees who work either in home offices or Town private or public entities, with a small percentage of residents commuting to Boston. While there is not a major retail and civic hub, there are a few small businesses, a general store, several churches, a library, and an ice cream stand near or close to the Town center. The six hundred acres

¹ Historical Guide to Carlisle Massachusetts, prepared by the Carlisle American Revolution Bicentennial Commission in 1975.
of the Great Brook Farm and State Forest, with their working dairy farm and ice cream stand are the focus of much of the recreational activities in the Town.

### 2.3 Population/Demographic Characteristics

The Town of Carlisle is governed by the Board of Selectmen and Open Town Meeting. There is a Town Administrator. As of the 2010 U.S. Census, there were 4,852 people, 1,695 households, and 1,442 family households residing in the Town. The population density was 291 persons per square mile. The racial makeup of the Town was 89.2% White, 0.4% African American, 0.0% Native American, 7.9% Asian, 0.0% Pacific Islander, and 0.5% some other race. Hispanic or Latino of any race, made up 2.1% of the population.

Of the 1,442 family households, 49.9% had children under the age of 18 living with them, 78.7% were married couples living together, 4.7% had a female householder with no husband present and 1.7 male householder no wife present. Non-family households with individuals living alone accounted for 14.9% of all households. Of these non-family households, 4.6% had someone living alone who was 65 years of age or older. The average household size was 2.86 persons and the average family size was 3.11 persons.

In the 2008 to 2012 American Community Survey, the population was distributed with 24.5% under the age of 19, from 20 to 24 years of age at 2.5%, 25 to 44 at 14.9%, from 45 to 59 at 32.3%, and 60 years and older at 26%. The median age was 48.4 years. The median income for a household in the Town was $160,000 and the median income for a family was $176,310, among the highest in the state. The per capita income for the Town was $76,856. It is estimated that 4.6% of the families meet federal poverty-level guidelines and 6% the population. Twenty-four individuals had received Food Stamp/SNAP benefits in the past year.

It is estimated that there are one hundred and forty-nine individuals over age 18 with disabilities, in the 2008-2012 American Community Survey. or 4.9% listed as having a disability. In the age 65 or older age group, there were 677 individuals total. Of this group, 18% or 122 individuals were listed as having a disability.

Appendix B is 2010 U.S. Census and 2008-2012 American Community Survey data for Carlisle.

### 2.4 Housing Characteristics

The 2008-2012 American Community Survey estimated that there were that there are 1,858 total housing units in the Town of Carlisle. Of these units 96.7%, or 1,796, are owner-occupied, representing a considerably higher level of owner-occupancy during this period than that for Middlesex County (62.2%) and for the Boston-Cambridge-Quincy Standard Metropolitan Statistical Area (61%). Moreover,
almost all of the existing housing units were in single-family detached structures, 1,790, or 96.3%, of the housing stock.

Of the 1,858 year-round housing units, the 46 units the state currently counts as affordable consist of the Carlisle Village Court development (18 units); Rocky Point Homeownership condominiums (2) and the Benfield Farms senior housing development (26). These 46 units comprise 2.5% of Carlisle’s current housing stock. The 18-unit Carlisle Village Court development is located in three two-story buildings, are all one-bedroom apartments for seniors or disabled adults over age 18. Two of these units are handicapped accessible. Neither Village Court nor Rocky Point has an elevator. The Benfield Farms development, which opened in March 2014, will serve seniors age 62 and older and has an elevator.

At Village Court there are one or two vacancies per year with a waiting list. Eleven of the units are set with rents for tenants with incomes 50% or less of the Area Median Income and the remaining seven units have rent set at 80% of the Area Median Income. All applicants must be over 62 years of age and/or handicapped or disabled; there are no local preference criteria such as being a Carlisle resident.

In the late 1980s, Carlisle established the Carlisle Housing Authority to promote affordable housing. In 2013, the Carlisle Housing Authority entered into a Land Development Agreement and Ground Lease with NOAH for the 26-unit Benfield Farms senior development to be built and operated with a 99-year Ground Lease on Carlisle Housing Authority property.

Housing prices are among the highest in the Commonwealth. The median single-family house was almost $683,051 as of the end of 2013. To afford this median price under conventional lending terms, a household would have to earn over $200,000. For further demographic information and the Town's proposed affordable housing development, including DDS Group Homes, see the 2010 Town of Carlisle Housing Production Plan [Appendix C].

While according to the 2008-2012 American Community Survey data the rental market is small at 7% of total units (125 units), rents in the area are high. For example, market rents for a nearby development, Avalon at Bedford Center, range from $1,500 to $2,300. Concord Mews and Avalon at Acton command the same rent levels.

The 338 Bedford Road Property is located in the Town of Carlisle, in Middlesex County, Massachusetts. Carlisle is bordered by Westford and Chelmsford on the north, Billerica and Bedford on the east, Concord on the south and Acton on the west. The Town of Carlisle is approximately 20 miles northwest of the city of Boston and 8.1 miles southeast of the City of Lowell. The nearest public transportation is bus service provided along Route 225 in Bedford, Massachusetts and commuter rail service provided by the Massachusetts Bay Transit Authority (MBTA) in Concord, Massachusetts. The nearest airports are in Bedford and Boston. A Site Context Plan is provided as Appendix E.

Carlisle Housing Authority Request for Proposal
December 3, 2014
The property is shown in a surveyor’s map and sketch plan approved by the Planning Board on November 5, 2012 and recorded at the Middlesex North Registry of Deeds on May 10, 2013, Book 263 Plan 1. (Appendix D).

In 2013, the parcel was purchased by the Trust, after the acquisition and bond authorization was approved by the 2012 November Special Town Meeting and Special Town Election. In Fall 2013, the Trust hired Abacus Associates Architects + Planners to produce a Master Plan Design for the Property. Abacus conducted two all-Town board charrettes, made presentations of the proposed plans produced in the charrettes to the Board of Selectmen, Board of Health, Conservation Commission, and the Planning Board. In January 2014, an all-Town community planning event was held for further input on the proposed plans. On February 27, 2014, the Trust voted to approve the 338 Bedford Road Master Plan Scheme 1A conceptual plan. The property is shown in context in Appendix E.

For the Town’s title and legal description, see the deed recorded with the Middlesex North Registry of Deeds, Book 27261, Page 256 (Appendix F).

Commencing on June 30, 2014, the Trust leased an approximately 1.36 acre portion of the property to the Authority for a 99-year term. The lease specifically authorized the Authority to enter into a sublease and development agreement with a developer to construct and operate an affordable group home for individuals with intellectual disabilities. The notice of lease is recorded with the Middlesex North Registry of Deeds in Book 28280, Page 211. The area to be developed for housing is approximately 1.36 acres and is located at 338 Bedford Road and noted on the Plan as “Leased Area” (Plan Book 238, Plan 20, recorded on June 27, 2014) (Appendix G).

The Trust approved the 338 Bedford Road Master Plan, which is the framework for development guidelines included in this RFP. The proposed 338 Bedford Road development will require Board of Selectmen Site Plan Review. The Authority and the Town of Carlisle are committed to supporting all necessary applications, waivers and appeals, including for Site Plan Review as needed to build the project as outlined in the approved plan. Engineering & Consulting Resources, Inc. prepared a Phase 1 Environmental Site Assessment for 338 Bedford Road [Appendix H]. The report, dated October 15, 2012, provides a summary narrative that describes the overall 338 Bedford Road Land site; environmental constraints and development issues; and site planning considerations. Abacus Associates Architects + Planners, Incorporated, developed the 338 Bedford Road Housing and Land Use Master Plan in concert with the Affordable Housing Trust and input from Town Boards. [Appendix I]
2.5 Site Information

The following information is provided for preliminary informational purposes only and should be independently determined and verified by prospective developers. Figures illustrating existing site conditions and site opportunities and constraints are included as Appendix G.

Lot 1 – Development Restriction

The site area comprising the ground lease area is approximately 1.36 acres. This area is bounded by a private residence to the south, woodlands and meadows to the east, a single-family residence to the west and finally Bedford Street to the north. The housing site is located on the front of the parcel and is considered developable and has a gentle slope. The northeast corner of the parcel is modestly impacted by vegetated wetland protected areas. The buffer zone surrounding this wetland shall not be developed. The housing site, hereinafter referred to as Lot A is illustrated on the surveyor map and sketch plan (Appendix G).

2.5.1 Neighborhood Description & Adjacent Uses

The community around the property is an area of modest and larger homes, subdivisions (shared driveways), woodlands, and a commercial parking lot and ice cream stand. Pathways across Bedford Street provide a short walk to the Town Center, the Gleason Public Library, the Carlisle Public Schools, the Police and Fire Stations, the Post Office, Town Hall, the Town Common, a church, a country store, business offices, and a dentist.

2.5.2 Utilities/Infrastructure

It is anticipated that the residential well and septic leaching field necessary for this development will be built on-site.

<table>
<thead>
<tr>
<th>Utility</th>
<th>Provider</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sewage</td>
<td>On-site</td>
<td>Development lot</td>
</tr>
<tr>
<td>Water</td>
<td>On-site</td>
<td>Development lot</td>
</tr>
<tr>
<td>Electric</td>
<td>NSTAR</td>
<td>Bedford Road</td>
</tr>
<tr>
<td>Gas</td>
<td>Keyspan</td>
<td>Bedford Road</td>
</tr>
<tr>
<td>Telephone</td>
<td>Verizon</td>
<td>Bedford Road</td>
</tr>
<tr>
<td>Cable TV</td>
<td>Comcast</td>
<td>Bedford Road</td>
</tr>
</tbody>
</table>

2.5.3 Summary of Site Opportunities & Constraints

The following description of physical, legal, and regulatory constraints is provided for informational purposes only. It should not be relied upon without independent verification by any proposed developer. Also included are some recommendations for the proposed development.
• The items listed below correspond to labels shown on the surveyor’s sketch plan and map (Appendix G).

• **Open Space/Large Forested Area/Meadow:** East of the development lot is the Fox Hill Conservation lot. West of the development lot is the Town-owned Banta Davis parcel, which is used for active recreation, a Carlisle Public Schools Wastewater Treatment Plant Leach Field, a cemetery and protected as a future school site. The Fox Hill Conservation Land currently has an agricultural license, which allows the tenant farmers to cultivate fruit trees, vegetables for and hay for commercial purposes. The property also has a trail which passes over the previously privately held 338 Bedford Road property (now owned by the Town of Carlisle Affordable Housing Trust) which connects the Fox Hill Conservation Land with the Town-owned Banta Davis property, this trail continues on to the Carlisle Public Schools and the Town Center. In winter, the Fox Hill Conservation Land is used for cross-country skiing practice.[Appendix J]

• **The 338 Bedford Road Property:** A Phase I Environmental Site Assessment has been done by Engineering & Consulting Resources, Inc. (2012) and no negative environmental conditions in connection with the parcel were revealed. The back portion of the parcel is reserved for future use for recreational purposes and/or a community/senior center. Therefore, a public safety easement will be required to connect the group homes’ driveway with the back portion of the property. This access will be used solely for public safety and not general circulation use.

• **Topography:** The property has a sixty-foot elevation rise. The development site has a gentle slope and has been used primarily for residential landscaping in the past.

• **Wooded Areas:** Existing trees, e.g. four-inch caliper at four feet, should be maintained whenever feasible. Town of Carlisle Scenic Road Planning Bylaws require preserving trees with a four inch caliber at the four foot level within the Bedford Street (which is a Scenic Road) right-of-way. Trees shall be maintained to buffer new development from adjacent residential neighbors wherever possible.

• **Drainage:** Soil Suitability for On-site Sewage Disposal Tests have not been conducted for Lot A.

• **Water Flow:** The anticipated direction of local groundwater flow is to the north and northeast of the development site toward the vegetated wetlands.

• **Residential Neighbors:** Two residential neighbors abut the site to the west and to the south. Every effort should be made to maintain the privacy of the existing residences and provide buffers between the Development and its neighbors. This might include but not be limited
to: providing four-season evergreen screening from the road, screening parking from the Bedford Road, etc.

### 2.5.4 Floodplain

The property is within the 500-year floodplain area.

### 2.5.5 Easements

The 338 Bedford Road Ground Lease will include a surveyed plan which outlines public access and utility easement which is recorded with the Ground Lease at the Middlesex North Registry. Since it will be a portion of the common road, the access road to be built as part of the Project must satisfy the requirements of the Town of Carlisle to be used as a secondary public safety access for the back portion of the property.

### 2.6 Zoning

The following description of provisions of the Carlisle Zoning Bylaws (the “Zoning Bylaws”) is for informational purposes only. It should not be relied upon without independent verification by any proposed developer.

The Town believes that the proposed use of the Property as a Group Home is an “educational purpose” as that term is used in Chapter 40A, Section 3 of the Massachusetts General Laws. The Property is located in a Residence B District. The table below is a summary of the requirements, detailed in the Zoning Bylaws, as they may pertain to the Development.

<table>
<thead>
<tr>
<th>Category</th>
<th>Provision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Lot Size</td>
<td>2 Acres</td>
</tr>
<tr>
<td>Frontage</td>
<td>250 feet</td>
</tr>
<tr>
<td>Group Homes</td>
<td>3.2.1.3 Public School or use by a religious sect or denomination or non-profit educational corporation for educational purposes</td>
</tr>
<tr>
<td>Maximum Height of Building</td>
<td>40’ or 2.5 stories or 45’ and 3 stories under certain conditions.</td>
</tr>
<tr>
<td>Lot Line Setbacks</td>
<td>40’ minimum</td>
</tr>
</tbody>
</table>

As the project will be a ground-lease on Town-owned land, it is anticipated that the designated developer will submit plans for Board of Selectmen Site Plan Review.

Town Meeting has previously voted to purchase the land for no more than two group homes with up to ten (10) bedrooms total.
3. Development Guidelines

The Development Guidelines presented in this section reflect the development objectives and desire of the Town to promote the development of DDS rental housing which has as low a visual impact on the neighborhood as possible while being of high quality and consistent with the intended use and green building objectives. [Appendix K]

3.1 Programmatic and Use Guidelines

The Authority will consider proposals for DDS rental housing of a variety of building types and funding models. However, the total number of group homes must be not more than two (2), and the total number of bedrooms in the duplex must be nine (9). The Authority’s major concern is that the proposed plan and development meet the particular objectives, requirements and restrictions listed below. Design guidelines are summarized in Section 3.2.

3.1.1 Summary of Components

The Development must include two (2) units of Group Homes with nine (9) bedrooms total;

- Developers are encouraged to be creative with financing opportunities in this area.

- Respondents should make every attempt to maximize affordability of the units to the greatest extent possible based upon real financing options.

- Preference for Carlisle residents should be provided to the extent permitted by law and guidelines for group homes for individuals with intellectual disabilities.

- All group home bedrooms must count towards Carlisle’s Housing Production Plan (HPP) production goals in the DHCD Subsidized Housing Inventory.

- The Development should attempt to incorporate the spirit of Carlisle architecture and open space.

- The Development should contain typical individuals with intellectual disabilities group home resident amenities.

- There may be spaces for offices for the group homes.

It is the Authority’s intention to encourage creativity on the part of the developer’s proposal. The Authority would like to take advantage of the developer’s experience and knowledge of the marketplace, green building practices and sustainable design.
3.1.2 Relationship to Environment/Design Approach

Proposed uses, developments and designs should be sensitive to the character and scale of the surrounding community and be sympathetic to the adjacent wooded and field areas. The proposed development should not detract from the scenery or existing resources nor have a significant negative impact on the environment of adjacent natural areas. The design should consider the fact that the driveway into the Development is paved.

3.2 Design Guidelines

The following Design Guidelines are intended to provide some direction to respondents on the design character and sustainability goals the Authority is seeking in proposals. The order of presentation does not indicate any priority or ranking of trade-offs among the Guidelines.

3.2.1 Program Guidelines

• Group Homes Buildings
  A connected multi-family unit of one or two stories, designed to be integrated with traditional New England style architecture. Each building and unit must be handicapped accessible to the extent feasible or required by law. Each building should contain laundry facilities.

• Living/Family Room
  A living/family room where residents may have gatherings and recreational opportunities.

• Staff and Visitor Parking
  Appropriate staff and visitor parking should be provided and screened from the Bedford Street view as practicable. A van boarding area should be located in an area accessible to all residents.

• Landscaping and Green space
  A natural landscaping style, consistent with surrounding environment and character of Carlisle, with four-season landscaping that includes flowering plants and bushes should be used. Low-water use and low-maintenance landscape plantings should be used wherever possible.

• Patio/Common Outdoor Area
  An outdoor patio and gathering place shall be provided.

• Building and Public Space Orientation
  Building orientation and materials use should utilize passive solar gain. Maximum building exposure shall face south wherever possible. Orientation should maximize solar exposure of open spaces.
• **Existing Trees**

Existing trees should be saved to the maximum extent possible. A buffer shall be provided between adjacent neighbors and the new development and between Bedford Road and the new development.

**3.2.2 Infrastructure Guidelines**

• **Driveway**

The driveway from road should be paved and have a low visual impact on Bedford Street. It shall be of the minimum width acceptable to the Town.

• **Water Supply**

Residential well(s) may be on the lot and piped to the development.

• **Septic**

The septic system serving the development shall be developed on Lot A.

• **Stormwater**

Stormwater management shall be consistent, in both wetland and non-wetland areas, with MassDEP Stormwater Standards and Handbooks. Low impact development designs and technologies should be used whenever possible.

**3.2.3 Character and Material Guidelines**

• **Stone walls**

Any existing stone walls should be retained when possible. New stone walls may be used to mark boundaries throughout the site. Existing onsite stone should be reused to form the stone walls to the extent feasible.

• **Architectural Style**

Architecture should integrate with the New England style building patterns, scale and character found in Carlisle. The architecture should be sensitive to the overall scale and style of the Bedford Street streetscape, but should also strongly consider green building technologies that might also inform the style of the architecture.

• **Scale and Siting/Orientation of Buildings**

The building or buildings should be sited to limit negative visual and noise impacts on neighboring residential properties.
• **Building Materials**
  Natural materials are the traditional building materials of the area and should be used to the maximum extent possible. Creative use of renewable resource or low maintenance material may be considered in so far as their visual impact does not detract from overall appearance. Design and building materials must conform to Class B+ or higher quality grading.

• **Indoor Lighting**
  Energy-star energy-saving lighting should be used throughout the building(s). Lighting should be always on in hallways. Lighting should go on with a motion sensor in other common areas (such as common area bathrooms).

• **Outdoor Lighting**
  Energy Star energy-saving lighting should be used outdoors. Lighting should provide for pedestrian and vehicle safety while at the same time located and directed so as to limit its impact on adjacent natural areas and the neighborhood.

• **Building Height**
  The height of buildings should not exceed two stories, and in any case should be sited to minimize the visual impact. All residential uses shall be located on the first floor.

• **Heating, Ventilation and Air Conditioning:**
  The Development should be designed and constructed with an Energy Star energy-efficient HVAC system.

### 3.2.4 Other Project Goals and Design Principles

• **Green Building**
  The Development should use high performance building technologies and should be as “green” and Energy Star certifiable as is cost effective and aesthetically integrated.

• **Recycle Onsite Materials**
  Existing site materials should be recycled.

### 3.3 Schedules

#### 3.3.1 Town’s Anticipated Schedule
  The Authority will review all proposals in as expeditious a manner as possible and get back to all respondents in writing of its decisions within 45 days.
3.3.2 Developer’s Anticipated Schedule

Developers should provide a timeframe for the development process based at least on the following milestones:

1. Prepare Development plans and budget.
2. Secure appraisal and other necessary information to prepare necessary regulatory and financing applications.
3. Apply for necessary regulatory relief.
4. Secure regulatory approvals.
5. Prepare and submit necessary materials to apply for subsidies.
6. Bid work out.
7. Secure construction financing commitment.
8. Finalize plans and secure all subsidies and permits.
9. Enter into a ground lease with the Authority.
10. Close on construction financing.
12. Oversee management and operation of the group homes. Complete construction, securing occupancy permits and delivering bedrooms to residents.

The Authority expects that the selected development team will, upon execution of a long-term lease and development agreement, move quickly to undertake and complete pre-development activities and start construction at the earliest feasible date. The Development should be constructed within a reasonable timeframe but in no event exceed 24 months, unless otherwise authorized by the Authority.
4. Developer Submission Requirements

4.1 SUBMISSION PROCESS

The Request for Proposals application package will be available starting at 9:00 A.M. on December 3, 2014 at the Town Administrator’s Office at Carlisle Town Hall, 66 Westford Road.

Completed copies of the RFP application must be submitted in a sealed envelope clearly marked “Authority, Ground Lease of 338 Bedford Road Property and Development Thereon of An Affordable Group Home Duplex for Individuals with Intellectual Disabilities Proposal” on the outside of the envelope. One (1) original and five (5) copies of the complete proposal must be received by NOON on January 28, 2014, at the same location addressed to –

Timothy Goddard, Town Administrator
Carlisle Town Hall
66 Westford Street
Carlisle, MA 01741

Late proposals will not be accepted.

Upon review, if any items are missing and/or incomplete, the Authority shall reject the application. Additionally, submission of proposals shall be deemed to incorporate the permission of the applicant to make any inquiries concerning the applicant as considered necessary to fully review qualifications.

Questions shall be addressed in writing to Timothy Goddard, Town Administrator, at the address listed above, received prior. If any questions arise at any time before this date, all answers will be in writing and the questions and answers will be shared with everyone on record as having received a copy of the RFP.

4.2 PRE-SUBMISSION CONFERENCE

A Pre-Submission Conference will be held at 10 A.M on December 17, 2014 at the Carlisle Town Hall, 66 Westford Street. A locus map and directions to this location are included in Appendix A. The Authority is not requiring all respondents to attend this Conference. However, all potential respondents are strongly encouraged to participate. The meeting will include a presentation of the main components of the Request for Proposals and provide an opportunity for interested respondents to have their questions answered.
4.3 SUBMISSION ENCLOSURES

The Town is interested in receiving proposals that satisfy the Development Guidelines and other requirements set forth in this RFP from any individual, company, firm, partnership, group or organization capable of leasing and developing the Property. Proposals not providing evidence of ALL of the following items will be considered non-responsive and shall not be given further consideration:

- Residential Development Experience Form included in this RFP as Appendix L. Responses to all items listed in Section 4.4 through 4.9.
- Current Workload Form (see Appendix M)
- Disclosure of Beneficial Interests Form–M.G.L. c.7C, 38 (see Appendix N)
- Statement of Tax Compliance Form – M.G.L. c. 62C, 49A (see Appendix O)
- Certificate of Non-Collusion Form (see Appendix P)

4.4 The Development Team

The proposal must include a description of the development team, the individuals and organizations to be involved in the development and their experience. The development team may include, without limitation, a development manager, property manager, architect, contractor, engineers, consultants, lenders and investors. This description must include the following information:

1) The name, address and telephone number of the developer, the name of any representative authorized to act on his/her behalf, the name of the contact to which all correspondence should be addressed, and the names and primary responsibilities of each individual on the development team.

2) If the developer is not an individual doing business under his/her name, a description of the firm and status of the organization (e.g., whether a for-profit, not-for-profit or charitable institution, a general or limited partnership, a corporation, LLC, LLP, business association, or joint venture) and the jurisdictions in which it is registered to do business.

3) The nature of the entity to acquire the Lease of the Property and the borrower and guarantors of debt, if any.

4) Identification of all principals, partners, co-venturers or sub-developers participating in the transaction, and the nature and share of the participants’ ownership in and compensation from the project.
5) The property developer will be expected to either oversee directly, or subcontract the management and operations of the group home development for the tenure of the lease.

6) The developer will be allowed to transfer the ground lease and/or the property management upon approval and authorization of the Authority.

7) Identification of the development team, such as architects, engineers, landscape designers, development consultants. Background information, including firm resumes and resumes for principals and employees expected to be assigned to the project, should be provided.

8) A summary of first, the developer’s, and secondly, the development Team’s experience, collectively and individually, and with similar projects, including affordable housing projects. Particular attention should be given to demonstrate experience with projects of a similar scale and complexity. Developers should demonstrate the ability to perform in accordance with their proposal, including the ability to pursue and carry out permitting, financing, marketing, design and construction, and to complete the project in a competent and timely manner.

A summary of the past residential development experience. See Appendix I for the required format for providing this information. Respondents may include a narrative that describes similar projects that explain why your experience is relevant to the proposed development project. (Recommended format at the end of this document.)

9) Identification of current workload. See Appendix L for the required format for providing this information. (Need to also get information on all current projects to see what other work they have and what they will need to balance. (Recommended format at the end of this document.)

10) Description of the organizational structure of the development team and a plan for the maintenance of effective communications between the Town and the development team during all phases of the project.

11) Confirmation that no local, state or federal taxes are due and outstanding for the development team or any constituent thereof.

12) Information regarding any legal or administrative actions past, pending or threatened that could relate to the conduct of the Developer’s (or its principals’ or any affiliates’) business and/or any of those entities’ compliance with laws and other governmental requirements.

13) Describe any procedures that relate to Developer’s ability to control costs and keep a project within budget.

14) Provide the name, address, telephone and fax numbers and email addresses of at least three business references whom we may contact regarding your business experience. For each, identify the property or properties about which the individual is informed. References may
include building owners, architects, engineers, subcontractors, and other building or development professionals with whom you have worked.

15) Resumes or brochures, if available.

**4.5 Development Concept**

The proposal must include a detailed description of the development concept including but not limited to:

1) Proposed uses for the Property projected total square footage, by use, number and size of units, affordability levels, amenities, etc.

2) Description of the target market, e.g. end-users, pricing and the strategy for marketing to these groups.

3) Discussion of the physical plan and architectural character of the project and how the various programmatic and physical elements of the development will relate to one another.

4) Discussion of environmental impacts, including but not limited to noise and traffic, during the construction and operating phases of the project. Mitigation should be proposed as necessary and appropriate.

5) Description of the benefits and detrimental impacts of the project to the surrounding area and to the Town of Carlisle including, without limitation, discussion of:
   a. Town services that will be required with the new development;
   b. A description of any other community benefits associated with the development; and
   c. Analysis of the ways in which the proposal satisfies the development guidelines in Section 3 of this RFP.

**4.6 Preliminary Plans**

The proposal must include a 1”-30’ site plan that describes parking layout and numbers of parking spaces, building layout, entries, major landscaping features, etc. The proposal should also include five duplicate architectural plans for the major residential components of the project on the Property, with elevations, renderings and typical floor plans.

**4.7 Implementation Plan and Project Timetable**

The proposal must include a description of how the development concept will be implemented, including but not limited to:

1) Detailed development schedule for all elements of the plan, including key milestones and projected completion/occupancy timeframes. The proposal should describe financial incentives to perform in accordance with the schedule (See Section 3.3.2 for required milestones).
2) Outline of required land use, environmental, operational and other governmental or regulatory approvals, including land use, zoning, development and environmental permits. The developer should provide a schedule for securing approvals as part of the proposal. The developer should note zoning variances, special permits or modifications required.

4.8 Management Plan
For the group homes within the project, the proposal must include a plan for the ongoing management of the developed facilities, including proposed property managers and their experience. The affordable housing units must be kept affordable in perpetuity in accordance with the Commonwealth’s guidelines.

Also describe how the Developer’s team handles post-construction complaints from buyers and tenants on completed projects. What is the Developer’s turn-around time for responding to complaints? How does the Developer monitor service responses?

4.9 Financial Proposal & Business Terms
Upon award of the contract, the Authority and Developer will enter into a long-term lease of the Property. Upon execution of the lease, the Developer will be required to provide payment and performance bonds, a guarantee or equivalents, naming the Town as dual obligee, in the full amount of the cost of construction of all buildings, structures and site improvements or under terms required by the Commonwealth or subsidy programs. These bonds or equivalent will be released when the development is complete. Developers should assume that the Property will be conveyed “as-is” without any representations with regard to its condition (including, without limitation, environmental condition).

4.10 Project Financing & Financial Analysis
The proposal must include:

1. A detailed statement of the proposed method of financing the project;
2. Sufficient information to demonstrate the Developer’s ability to obtain financing for the project;
3. A description of the entity funding predevelopment costs associated with the project, and demonstration of its capacity to fund such costs.
4. A financial plan, presenting a detailed description of all “sources and uses” of funds as well as a statement and plan for financing the development in the same format as the state’s One Stop Application.
5. On April 28th, 2014 Carlisle Town Meeting approved up to an additional $50,000 of Community Preservation Act funding to be used toward senior affordable housing infrastructure, e.g. septic system, well, landscaping and/or a road. These funds will be held by the Town of Carlisle Affordable Housing Trust and released, once necessary infrastructure permitting has been acquired. Developers will need to demonstrate the need for these additional town funds in their proposal pro formas.

The financial analysis provided in this section must be sufficient to demonstrate the financial feasibility of the proposal.

4.11 Financial Qualifications
The proposal must include evidence of the financial status of the developer, demonstrating the financial strength to carry out the proposed development. This shall include current financial statements for two (2) years from the developer. Also, provide the name, address, telephone and fax numbers, and email addresses of a contact at one or more financial institutions that are familiar with your current financial status and past experience. Provide contacts for lenders on all projects carried out within the last five years, including all current projects.
5. Review and Selection Process

The review process will consist of two phases. First, all applications must meet the Level 1 or threshold requirements specified below. Only proposals that meet the Level 1 threshold criteria will be reviewed under the Level 2 competitive evaluation criteria.

5.1 LEVEL 1 THRESHOLD REVIEW PROCESS

All applications must meet the threshold requirements specified as follows:

a) One (1) original and five (5) complete copies of the application with all required attachments must be submitted. Each application copy must include all materials listed in Sections 4.3 – 4.11.

b) Respondent’s Residential Development Experience Form must reflect experience as a group home developer or contractor of at least two (2) projects involving the construction of at least four (4) housing units per project; and

c) Respondent’s Tax Compliance form must indicate that respondent is up-to-date on all state and local taxes or have an acceptable explanation as to why tax payments are not current.

d) All Proposals shall be deemed to be public record within the meaning of M.G.L. Chapter 4, Section 7(26) after the deadline for receipt of proposals.

e) Satisfactory submission of required certifications (see Appendix M).

FAILURE TO MEET THESE THRESHOLD REQUIREMENTS WILL RESULT IN THE REJECTION OF THE APPLICATION.

5.2 LEVEL 2 COMPETITIVE EVALUATION PROCESS

5.2.1 Ranking

All developers who pass the threshold requirements will be evaluated and ranked based on competitive selection criteria that are summarized below. With these criteria the Authority will be able to look at the relative merits of the proposals.

5.2.2 Construction Experience and Capacity

Developers will be evaluated as to the extent and type of their construction experience, including the number, size, and scale of projects, the quality of workmanship, inclusion of green-building practices, and the timeliness of completion. Greater weight will be given to residential projects, especially group home developments. Proposals will also be assessed according to the strength of the development team as evidenced by the inclusion of professionals.
among the principals and the experience and quality of relationships with subcontractors (e.g., architect, engineer, attorney). The development team should include an architect (or registered design professional), an environmental or civil engineer, a surveyor, and an attorney. In the case of joint ventures, greater weight will be given to developers who have previously carried out successful projects together.

**Highly Advantageous:** Majority of development team has more than five (5) years of experience in housing development including new group home construction; combined team has had a significant role in at least ten (10) housing developments, at least three (3) of which have included affordable units.

**Advantageous:** Less than half of the development team has had more than five (5) years of experience in housing development that includes group home construction; combined team has had a significant role in least five housing developments, at least one (1) of which included affordable units.

**Less Advantageous:** The development team has had no experience in affordable housing development.

### 5.2.3 Financial Experience and Capacity

Developers will be evaluated on the extent of their financial strength to support the most favorable terms from a construction lender, their demonstrated capacity to absorb losses or cost overruns (based on financial statements and other information submitted), the extent to which financial references verify financial capacity of the developer, and prior history of completing projects within budget and time constraints. Developers will be responsible for securing construction financing and will be required to submit a Letter of Interest from an established financial institution that indicates a willingness to fund the Project.

**Highly Advantageous:** The developer has a good credit history, including no bankruptcy within the past seven (7) years and no pending litigation. The developer has a demonstrated capacity to secure the necessary financial resources to complete the Development and to absorb losses or overruns and a borrowing capacity of at least $1.5 million. The developer has been able to secure financing for Projects that require greater amounts of financing than what will be necessary for the completion of the Development.

**Advantageous:** Developer has an acceptable credit history, including no bankruptcy within the past seven (7) years and no pending litigation that would impact his/her ability to complete the Development. References indicate that the developer has access to
the financial resources to complete the Development and a borrowing capacity of at least $2 million. The developer has been able to secure financing for Projects that are at least similar in size and scope to the Development.

**Less Advantageous:** The developer has a questionable credit history that might potentially jeopardize access to necessary financing. The developer has not undertaken a project of the same size and scope as the Development and does not have a track record thus far to secure financing at a level that will be necessary to complete the Project.

### 5.2.4 Feasibility of Development Plan

The ability of the development team to understand the complexities of affordable housing development and the challenges posed by the Property is key to the success of the Development. All development and construction costs must be reasonable and consistent with similar type projects. Developers will be assessed according to how the proposal strikes a balance between Project quality and cost. Respondents must submit a projected development budget.

**Highly Advantageous:** The respondent has a clear development plan, including a reasonable development and construction budget and a thorough understanding of project requirements.

**Advantageous:** The respondent has a clear plan with a generally acceptable development and construction budget as well as some understanding of Project requirements.

**Less Advantageous:** The respondent does not present a clear plan and acceptable development and construction budget and demonstrates a lack of understanding of Project requirements.

### 5.2.5 Quality of the Proposed Design and Product

Proposals will be evaluated according to how the proposed design is compatible with Project Guidelines included in Section 3 of this RFP. Developers are required to provide preliminary schematic designs of elevations, floor plans and site plans. Information on basic construction materials, where appropriate, should also be provided.

**Highly Advantageous:** The proposed design conforms to all or almost all of the guidelines set forth in the RFP and is appropriate for the property and the target population.

**Advantageous:** The design conforms to most of the guidelines set forth in the RFP and is appropriate for the property and the target population.
Less Advantageous: The design does not conform to most of the guidelines set forth in the RFP.

5.2.6 Cost Control Ability and Current Capacity

Developers will be evaluated on their ability to begin the Development within two (2) months after the award of the contract and to complete the Development quickly and complete the Project quickly and within budget as evidenced by past performance, current commitments and the adequacy of procedures devoted to cost control.

Highly Advantageous: The developer has a number of procedures in place to support efforts to complete housing developments on time and within budget. The developer has a proven track record in beginning and completing projects on time and within budget.

Advantageous: The developer has been able to begin and complete projects on time and within budget for many of his/her completed housing developments.

Less Advantageous: The developer has demonstrated difficulties in beginning and completing projects on time and within budget.

5.2.7 Ability to Work with Government

Developers will be assessed according to the extent of successful experience working with government-assisted programs.

Highly Advantageous: The developer has substantial experience in affordable housing development.

Advantageous: The developer has limited experience in affordable housing development.

Not Acceptable: The developer has no experience in affordable housing development. The developer’s affordable housing development experience has been with building affordable housing at the B or less design and construction level grade. The developer has a past history of State Ethics or Procurement violations with the Attorney General or the Inspector General.
5.3 CONDITIONS, TERMS AND LIMITATIONS

This Request for Proposals is subject to the specific conditions, terms and limitations stated below:

5.3.1 The Property is to be conveyed by lease “as is” without any representations with regard to its condition.

5.3.2 The Development shall conform to, and be subject to, the provisions of all other applicable laws, regulations, and ordinances of Federal, State, Regional and Town authorities having jurisdiction.

5.3.3 Valid permits and approvals, as required by Town, Regional, State and Federal agencies, shall be obtained by the developer/contractor prior to commencing work.

5.3.4 The selection of a developer will depend on satisfying the additional documentation and review requirements described in this RFP and will be subject to the selection criteria described in Section 5.2 of the RFP.

5.3.5 No transaction will be consummated if any principal of any selected developer is in arrears or in default upon any debt, lease, contract or obligation to the Town of Carlisle, including without limitation, real estate taxes and any other municipal liens or charges. The Authority reserves the right to reject any proposal by any such developer.

5.3.6 The Authority is not obligated to pay, nor shall in fact pay, any costs or losses incurred by any developer at any time including the cost of responding to the RFP.

5.3.7 This RFP does not represent any obligation or agreement whatsoever on the part of the Authority.

5.3.8 Selection of a developer’s proposal will not create any rights on the developer’s part, including, without limitation, rights of enforcement, equity or reimbursement, until all related documents are fully executed and approved by the Authority.

5.3.9 The most advantageous proposal from a responsive and responsible proposer, taking into account consideration price and all other evaluation criteria set forth in the RFP, will be selected. The Authority reserves the right to reject any and all proposals if it determines that it is in the best interest of the Authority and the Town to do so.

5.3.10 All determinations as to the completeness or compliance of any proposals, or as to the eligibility or qualification of any developer, will be within the sole discretion of the Authority.

5.3.11 This RFP, and any agreement resulting therefrom, are subject to all applicable laws, rules and regulations promulgated by any Federal, State, regional or municipal authority having jurisdiction over the subject matter thereof.

Carlisle Housing Authority Request for Proposal
December 3, 2014
5.4 SELECTION PROCESS

The main objective of the Development is to provide quality group home affordable rental housing for residents of Carlisle and the surrounding area where escalating housing market values are making housing that is affordable to the developmentally disabled as well as working families a scarce commodity. In the Town of Carlisle and surrounding areas affordable rental housing is in short supply. This local housing market, compounded with escalating housing market values and real estate taxes, the Authority foresees that affordable rental housing for disabled persons will only become more of a scarce commodity looking forward into the future.

Proposals from developers with strong technical and financial capacity that provide the best product will be most competitive. At the heart of the competitive criteria is an evaluation of whether the Development, as proposed, is feasible based on Program Guidelines.

All proposals that are submitted by the deadline will be opened in public and logged in. The review of proposals will begin immediately after the submission deadline. The Authority will coordinate the review and selection process leading to a designated developer to undertake the assigned parcel development of the Property.

Respondents may be interviewed to answer questions or to solicit additional information on their proposal and their ability to finance and complete the Development. Further evaluation will include a review of references and may involve site visits to other projects completed by the respondent as well as an examination of additional financial or design information. In evaluating qualifications, the combined experience and resources of all principals, if applicable, will be considered.

It is anticipated that all applicants will be notified of the results of the selection process in writing within 60 days of the submission deadline.

The Authority will review proposals and select a developer with whom to negotiate a land disposition agreement. The Authority will also seek comments from the Board of Selectmen the Planning Board, Housing Trust, Zoning Board and other relevant boards and committees on the finalist’s proposed plan prior to preliminary designation. If the Housing Authority and selected developer are unable to come to agreement after a reasonable period of time on the terms and conditions for proceeding with the Development, the Authority will proceed to the next highest ranked finalist and ask that party to negotiate until an agreement is reached with a satisfactory developer or the Authority terminates the process.

After the selection, the developer will be granted a preliminary designation as developer and will be granted a period of time to develop preliminary plans.
for permitting purposes and undertake due diligence investigations. During this period the following will occur:

1) The Designated Developer will conduct its due diligence in accordance with the schedule proposed in the RFP and agreed upon with the Authority.

2) The Designated Developer will prepare plans and budget.

3) The Designated Developer will attend two Authority Meetings where abutters will be able to review designs and make comments.

4) The Authority will review and sign off on the proposed plan.

5) The Developer will apply for necessary regulatory relief.

6) Secure regulatory approvals.

7) Finalize plans and secure all subsidies and permits.

8) Bid Work out.

9) Close on construction financing.

10) Following successful permitting, the Authority will sign the ground lease at the financial closing.

11) Begin construction

For any additional information, please contact: Timothy Goddard at 978-371-6688, mail to: tgoddard@carlisle.mec.edu