



**Town of Belmont, Massachusetts  
Office of Planning and Building and Belmont Housing Trust  
Request for Qualifications**

**Affordable Housing Consultant Services**

**1. INTRODUCTION**

The Town of Belmont is committed to providing and preserving Affordable Housing for eligible low-income households. To this end, the Town is seeking to enlist the administrative and technical services of a qualified consultant, to ensure the Town is in compliance with local and State requirements, and for other related housing administrative purposes.

Competitive candidates will demonstrate:

- Expertise in Massachusetts Affordable Housing legislation, policies, and trends such that the Project Manager/Project Team is able to provide timely, relevant service and advice on such matters.
- The ability to maintain timely, professional, and clear lines of communication with residents, Town staff, the Belmont Housing Trust, other Town Boards and Committees, the State, developers, and others the Project Manager/Project Team may encounter while discharging their duties.
- A history of excellent customer service and sensitivity to the needs of persons facing housing insecurity.

It is expected that all services will be provided for an initial term of one (1) year, beginning July 22, 2024 and ending June 30, 2025, with renewals on a three (3) year term based on mutual agreement

Belmont is seeking quotes for the services described in this RFQ on a task specific basis.

**2. SCOPE OF SERVICES**

A Consultant is being enlisted to conduct the following services:

**Task A: HOME Funding and Projects**

- 1) Coordinate projects with the WestMetro HOME consortium, monitoring use of HOME funds in Belmont, and developing and assisting in the submittal of necessary administrative documents.

**Task B: SHI-related Activities**

- 2) Review and update the database of all the Town's Subsidized Housing Inventory (SHI) units;
  - 1) Add corresponding AMI and bedroom size information;
  - 2) Monitor and update the database to ensure compliance with State and local regulations.
  - 3) Ensure the Town is in receipt of all pertinent documentation required from SHI developers and apartment development owners/managers to ensure compliance with local and State Affordable Housing laws and deadlines. This is including but not limited to timely monitoring of rent increases for Affordable Housing units with rents tied to changes in the AMI and timely notice to the Housing Trust.
  - 4) Provide oversight on behalf of the Town of the resale of Affordable For-Sale Units, to ensure full compliance with State and Local requirements.
  - 5) Monitor rental and for-sale occupancy process for Affordable Housing, working with the developer's compliance agency to ensure adherence to the Affirmative Fair Housing and Marketing Plan.

**Task C: CPA Funding and Projects**

- 6) Assist with screening of developers/applicants for CPA community housing funds and monitoring the use of these funds (as needed).

**Task D: Support for Housing Trust**

- 7) Serve as point of contact (via phone and or email) for general inquires that come to the Town or Housing Trust from persons seeking Affordable Housing options or resources.
  - [a] Create and maintain a call log of such interactions so that the Town and Trust can assess Affordable Housing needs and requests
  - [b] Develop and maintain a knowledge base of local Affordable Housing resources to make referrals.
- 9) Identify and prepare materials to maintain and update the Housing trust web page.

**Task E: General Planning Support**

- 10) Identify Affordable Housing compliance violations, and alert Planning Department for remedial action.
- 11) Prepare and submit annual reports and documentation to the State as required (e.g., SHI reports).
- 12) Complete and/or assist in the completion of Affordable Housing-related grant applications.

13) Provide occasional data and reporting on the Town's SHI and Affordable Housing needs for reports, studies, grant application, etc.

## **2. SPECIFIC DELIVERABLES**

### **Year 1**

- Create and update central digital document repository for Town's Subsidized Housing Index units
- Create compliance list – certifications, violations (with course of action)
- Create and update a call log for Affordable Housing options or resources
- Create a map of the HOME process (existing project requirements, and new project creation) and an annual schedule for Belmont participation
- Ensure compliance with HOME funds requirements and project updates
- Evaluate developers' requirements applying for CPA funds

### **Ongoing**

- Maintain the SHI database
- Update central digital document repository for Town's SHI
- Annual reports and documentation to the State (e.g., SHI reports)
- Maintenance of compliance list – certifications, violations (with course of action)
- Update a call log for Affordable Housing options or resources
- Provide data and reporting on the Town's SHI and Affordable Housing needs, as necessary for reports, studies, grant application, etc.
- Ensure electronic copies of any formal correspondence or program materials prepared under this contract are saved in central digital document repository

## **3. SUBMISSION AND SELECTION PROCESS**

### **A. Submission Requirements**

- A detailed statement of the applicant's approach to the scope of services tasks and deliverables. Also discuss how the applicant will add value to the Town and is suitable for the assignment. Tasks shall be broken out A-E and specifically denote approach. Price proposal shall be broken down by same tasks.
- Qualifications and Organizational Chart - An organizational chart showing proposed project personnel (by name), their roles (i.e., the main project elements to which they will contribute), reporting relationships within the organization, and billing rates.
- A separate organizational chart must be provided for each proposed subcontractor.
- Applicants shall assign and identify a Project Manager who has direct oversight of the administration of the Contract with the Town and is qualified and experienced in: (1)

Affordable Housing administration (2) requirements of the G.L. c.40B, 40R, LIP, and HOME processes, and (3) providing services to, or relevant experience as an officer or employee of a municipality or state agency, of the Commonwealth of Massachusetts.

- If applicants are a Team, qualifications should demonstrate experience working together as a team to effectively complete similar projects.
- Please also see below Evaluative Criteria section.
- Resumes - Resumes of all individuals that will be committed to the project, detailing their professional qualifications and work histories, and highlighting their work experience relevant to the RFQ. Resumes of any proposed sub-contractors are also required.
- References – Provide at least three (3) references from similar projects completed within the past five (5) years. Reference information must include:
  - 1) project name and location
  - 2) municipality, agency or firm for which services were provided, with address, contact, person, and telephone number, and
  - 3) brief project description and budget.
- Capacity - Identify any overlapping projects that key project personnel will be, or may be, engaged in during the project period, and describe how their effort will be allocated to this Contract in relation to the other project(s).
- Potential Conflicts of Interest - Identify any potential conflicts of interest or affiliations with groups or persons that have an interest in this project.
- Certifications (see project web page for these instruments)
  - Certification of Good Faith
  - Certificate of Tax Compliance
  - Certification of Non-Conflict of Interest
  - Certification of Eligibility
  - Price Proposal Signature Page

**a. Submission Logistics**

Applicant should submit *non-price responses* to the RFQ as a PDF saved as "Affordable Housing Consultant Services – NON-PRICE Proposal".

Additionally, the Applicant should submit the *price responses* to the RFQ as a PDF saved as "Affordable Housing Consultant Services – PRICE Proposal".

Responses to the RFQ must be received in the Town of Belmont Office of Planning and Building no later than 3:00 PM, June 14, 2024. Faxed responses to the RFQ will not be considered and the postmark date is not relevant.

Qualifications shall be emailed with the subject “Affordable Housing Consultant Services” to:

Christopher J. Ryan, AICP  
Director of Planning & Building  
Town of Belmont  
Homer Municipal Building  
19 Moore Street  
Belmont, MA 02478  
cryan@belmont-ma.gov

**4. RFQ Pre-submission Meeting/Questions/ Qualification Modifications**

The Town is offering a RFQ Pre-submission Meeting on May 28 at 10am via Zoom. If interested in attending, please RSVP by May 21<sup>th</sup> by emailing [cryan@belmont-ma.gov](mailto:cryan@belmont-ma.gov) with the subject: “Affordable Housing Consultant Services – Meeting RSVP”

Applicant may email questions pertaining to the Scope of Work to Christopher J. Ryan at the above address by June 7, 2024. The text of all questions determined relevant, and the answers provided, will be posted to the Town’s website at:

<https://www.belmont-ma.gov/housing-trust/pages/housing-trust-housing-services-rfq-page>

During the review process, an Applicant may be asked to clarify any unclear statements, and/or may request additional information.

The Applicant may also request changes to bring them into compliance with state or Town regulations, or for other reasons. Applicants will be informed of any such requested changes at the time they are notified they have been selected as a short-listed firm.

**5. Interviews**

The Town will interview applicants with the highest scores based on the ranking process described below. Interviews will be scheduled at a mutually convenient time and will be held at Belmont Town Hall in June 2024.

**6. Selection Schedule**

The anticipated schedule for consultant selection:

Date	Event
May 8, 2024	Request for Qualifications sent to Consultants and posted to website
May 15, 2024	Last day to RSVP for RFQ Pre-submission Meeting

May 28, 2024	RFQ Pre-submission Meeting at 10am via Zoom
June 7, 2024	Deadline for submitting written questions about the RFQ to Town Staff
June 8, 2024	All questions and responses posted to website
June 14, 2024	Responses to the RFQ due at 3:00 PM.
Week of June 17th	Responses to the RFQ reviewed.
June 21, 2024	Short-listed Firms contacted for interviews by the Town of Belmont.
July 5th, 2024	Contract with selected applicant negotiated and executed.

## 7. SELECTION CRITERIA

### A. Minimum Criteria

At a minimum, Consultants must submit all materials requested in accordance with the exact specifications of this request for qualifications. Consultants who meet these minimum criteria will have their submissions reviewed.

### B. Evaluative Criteria

In addition to the above, the following evaluative criteria will apply to applicants for this Request for Qualifications:

#### **Criterion #1, Affordable Housing Administration**

At least three (3) years of experience in the Commonwealth of Massachusetts providing the following:

- Creating, updating and managing an SHI
- demonstrated understanding of 40B, 40R and Affordable Housing, including insights into local conditions and relevant challenges.
- supervising affordable rental and for-sale units' initial occupancy process for compliance with local and state laws
- identifying and remedying SHI compliance violations
- preparing and submitting annual SHI reports to the State
- oversight of the resale of Affordable For-Sale Units for compliance with local and state laws
- providing services to, or relevant experience as an officer or employee of a municipality or state agency, of the Commonwealth of Massachusetts

1. The above criterion will be considered as follows: Highly Advantageous: PM/Project Team has more than three (3) years of experience with a project similar in scope to these specifications.

2. Advantageous: PM/Project Team has at least three (3) years of experience with a project similar in scope to these specifications.
3. Not Advantageous: PM/Project Team has less than three (3) years of experience with a project similar in scope to these specifications.

**Criterion #2, Qualifications:**

Past work demonstrates Affordable Housing expertise, creativity and thoughtfulness in executing tasks outlined in the Scope of Services and elsewhere in the RFQ.

The above criterion will be considered as follows:

1. Highly Advantageous: Applicant demonstrates a strong understanding of 40B, 40R and Affordable Housing, high technical competency to address all RFQ elements, and/or originality and thoughtfulness of proposed approach to achieving completion of the Scope of Services.
2. Advantageous: Applicant demonstrates understanding of 40B, 40R and Affordable Housing, sufficient technical competency to address all RFQ elements, and/or an adequate approach to achieving completion of the Scope of Services.
3. Not Advantageous: Applicant demonstrates limited or no understanding of 40B, 40R and Affordable Housing, lacks technical competency to address all RFQ elements, and/or provides an inadequate approach to achieving completion of the Scope of Services.

**8. CONTRACT NEGOTIATION AND PAYMENT PROCEDURES**

**A. Contract Negotiation Process**

Applicant may suggest changes to the Scope of Services, with supporting rationale, in its response to the RFQ. The Town will respond to any suggested changes from short listed Applicants *only*, indicating whether the changes are acceptable, not acceptable, or acceptable with conditions.

Substantive differences between the Town and Applicant (i.e., changes deemed not acceptable by either party) will need to be resolved before selecting a consultant. Any remaining (minor) differences will be resolved before a contract is awarded. If substantive differences cannot be resolved the Town may terminate negotiations with winning bidder and engage in negotiations with second place bidder.

Following consultant selection, the successful applicant will be recommended to the Belmont Office of the Select Board for contract award.

**B. Project Budget and Payment Terms**

The fee for this project shall be negotiated. The fee shall reflect the scope of work performed by the selected consultant.

Consultant will invoice the Town for services at negotiated benchmarks or intervals of the Contract term.

The Town will not pay for (and Consultant should not bill for) services, training, equipment or other items that the Consultant, in representing itself as qualified to bid on the RFQ, would be reasonably expected to possess. Specific examples include, but are not limited to:

- Professional training of any kind
- Computer hardware, software or any reusable equipment.