

CARLISLE HOUSING AUTHORITY
REQUEST FOR PROPOSALS FOR THE
DEVELOPMENT OF SENIOR AFFORDABLE HOUSING
ON THE BENFIELD PROPERTY IN CARLISLE,
MASSACHUSETTS

Members of the Carlisle Housing Authority

Alan P. Lehotsky, Chair
Eugenia Harris, Treasurer
Susan Stamps, Secretary
James Bohn
Steven C. Pearlman

Date Issued: Wednesday August 13, 2008

Due Date for Responses: Wednesday October 15, 2008

Applications will be accepted no later than 2:00 P.M. 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 Chapter 30B and the state Inspector General's Procurement
Manual, the Disposition of Public Land.

CARLISLE HOUSING AUTHORITY

REQUEST FOR PROPOSALS FOR
THE DEVELOPMENT OF SENIOR AFFORDABLE HOUSING ON THE BENFIELD
PARCEL IN CARLISLE, MASSACHUSETTS

Table of Contents

- 1. Invitation to Bid**

- 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. Benfield Parcel, South Street, Carlisle Conservation Restrictions #57 and #58**
- C. Massachusetts Housing and Community Development Community Profile and 2000 United States Census Data for the Town of Carlisle**
- D. Neighboring Community Affordable Senior Rental Housing Survey**
- E. Site Context**
- F. Benfield Parcel, South Street, Carlisle Deed**
- G. Surveyor's Map and Sketch Plan**
- H. Phase I Environmental Assessment, Rizzo Associates, January 28, 2004**

I. Residential Development Form

J. Current Workload Form

K. Beneficial Interests Form

L. Tax Compliance Form

M. Non Collusion Form

1. Invitation to Bid

Introductory Instructions

The Carlisle Housing Authority ("Authority") is issuing this Request for Proposals ("RFP") to invite proposals from qualified developers for the development of 26 units of senior affordable rental housing on a 4.39 acre lot within a 45.23 acre property known as the Benfield Property ("Property") that is owned by Town of Carlisle ("Town") entities. The purpose of this RFP is to identify and select a developer for the Development that will provide quality affordable housing for senior residents of Carlisle and the surrounding area.

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 Ms. Madonna McKenzie, Town Administrator, Carlisle Town Hall, 66 Westford Road, Carlisle, Massachusetts 01741 before ?(date – one week prior to when responses are due.) If questions arise at any time before this date, all answers will be in writing and the questions and answers will be shared with all those who have received a copy of the RFP.

A Pre-Submission Conference will be held at 10:00 a.m. on August 28, 2008, 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.

An original and five copies of the proposal shall be returned in a sealed envelope clearly marked "Carlisle Housing Authority, Benfield Proposal" on the outside of the envelope to:

Ms. Madonna McKenzie
Town Administrator
Carlisle Town Hall
66 Westford Street
Carlisle, MA 01741

All proposals must be submitted by 2 PM on October 15, 2008, when they become the property of the Carlisle Housing Authority and are subject to applicable Public Record Laws. **Late applications will not be accepted.**

Respondents to the RFP will be able to correct or modify their proposals, but must submit one original and five 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 Carlisle Housing Authority reserves the right to reject any and all proposals or to cancel the RFP if for some reason it is determined that it would be in the best interest of the Town and the Carlisle Housing Authority.

The Carlisle Housing 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.

1.2 Introduction to the Project

The Carlisle Housing Authority ("Authority") is pleased to present this Request for Proposals ("RFP") for the development of Senior Affordable Housing on Lot 1 of the 45.23-acre Benfield Property (the "Property") in Carlisle, MA. This 45.23-acre property holds Affordable Housing, Conservation and Recreation restrictions, and offers an opportunity to create a high-quality affordable rental housing community for seniors in the Town of Carlisle on part of the site, specifically Lot 1, a 4.39-acre parcel, which is at the front of the Property. Provision has been made, and included in the Conservation and Recreation Restrictions placed on the property, to allow both septic system and wells to be located on adjacent Lots 2, 3 and 4 on the property [see Appendix B]. The proposed senior housing, septic system and well shall herein after be referred to as "the Development."

The Property is located on South Street and, in 2004, was purchased by the Town of Carlisle using Community Preservation Act (CPA) funds for the development of much needed affordable housing, as well as for conservation and recreational purposes. The property is generally bounded by woodlands and conservation lands to the west and by residential properties to the north and south. In September 2007, the Town of Carlisle executed the deed to Lot 1 of the Property to the Carlisle Housing Authority in order that they develop it for affordable housing.

The deed to the Authority is recorded in Middlesex North Registry of Deeds Book 21698 Page 285. The Authority's title is subject to a Declaration of Easements recorded in Book 21698 Page 202 (regarding a common access road for Lots 1 through 4) and a Conservation Restriction recorded in Book 21698 Page 234. Its title also has appurtenant rights created pursuant to Article 1 of the March 23, 2004 Special Town Meeting, as specified in the deed to the Carlisle Conservation Commission at Book 21698 Page 281 and the deed to the Carlisle Recreation Commission at Book 21698 Page 289. A copy of the Town Meeting Vote appears as Exhibit A attached to the aforesaid Declaration of Easements.

The Authority's main objective for Lot 1 is to ensure the development of mixed-income senior rental housing, maximizing affordability. The Authority second objective is that the development of Lot 1 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 affordable housing and minimizing adverse impacts on environmental quality and the surrounding neighborhood.

The Carlisle Housing Authority's decision to build affordable rental housing for seniors on the Benfield Land was based upon community input, research and an extensive decision-making process that involved ranking evaluative criteria. Activities included, but were not limited to: collaboration among the Housing Authority, the Council on Aging and the Town of Carlisle Affordable Housing Trust; community housing summits and community meetings; invitations to speakers from communities (such as Bedford and Chelmsford) which have successfully developed affordable housing; consultation with the Tax Assessor's Office (determining both analytic and empirical demand for senior tax abatements); and site visits to other affordable senior rental housing developments.

The secondary goal in the proposed Benfield Affordable Senior Rental Housing Development is to integrate the provision of rental housing with supportive services in concert with state agencies. This decision was the result of extensive consultation with neighboring housing authorities and discussion with the Village Court Board of Directors (the sole senior affordable housing development in town, which does not have an elevator) that has current tenants who need some level of coordinated services.

The Authority will now select a developer to prepare a more detailed plan, acquire a long-term lease on Lot 1 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, but current zoning of the site (Residence B) does not permit the density of housing and number of multi-family units contemplated for Lot 1. The preferred development scenario is 26 residential senior affordable rental units with at least 25% of these units dedicated to meet state affordability guidelines targeted to those earning at or below 80% of area median income, the remaining units rented to persons with incomes no greater than 100% of area median income (AMI). It is the intention of the Authority and Carlisle to maximize the affordability of these proposed senior units 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 2 PM, October 15, 2008. 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 solders 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 the rural charm of a New England village with its historic landmarks and its Town Meeting form of government.¹

2.2 Community Character

Today, Carlisle is a spectacularly, yet gently, beautiful community. There is a lush landscape with woods, a river and streams. It is a community of farms and residences. Its residents commute to work to Boston and its suburbs, with many residents commuting to other parts of the United States and foreign countries for employment. Carlisle retains much of its charm and

¹ Historical Guide to Carlisle Massachusetts, prepared by the Carlisle American Revolution Bicentennial Commission in 1975.

character from earlier years. While there is not a major retail and civic hub, there are a few small businesses, a general store, several churches and a library near the town center. The six hundred acres of the Great Brook Farm and State Forest are the focus of much of the recreational activities in the town.

2.3 Population/Demographic Characteristics

The Town of Carlisle is governed by a Board of Selectmen, Town Administrator and an Open Town Meeting. As of the census of 2000, there were 4,717 people, 1,618 households, and 1,372 families residing in the town. The population density was 282 per square mile. The racial makeup of the town was 94.7% White, 0.4% African American, 0.4% Native American, 5.4% Asian, 0.1% Pacific Islander, and 0.3% from other races. Hispanic or Latino of any race, made up 0.12% of the population.

Of the 1,372 family households, 46.4% had children under the age of 18 living with them, 78.6% were married couples living together, 4.7% had a female householder with no husband present, and 11.4% were non-families. Non-family households with individuals living alone accounted for 11.4% of all households. Of these non-family households, 4.9% had someone living alone who was 65 years of age or older. The average household size was 2.92 persons and the average family size was 3.18 persons.

In 2000, the population was distributed with 26.3% under the age of 19, from 20 to 24 years of age at 1.8%, 25 to 44 at 23.2%, from 45 to 59 at 29.1%, and 60 years and older at 13.7%. The median age was 41.9 years. The median income for a household in the town was \$129,811 and the median income for a family was \$142,350, among the highest in the state. The per capita income for the town was \$59,559. Families meeting federal poverty-level guidelines totaled 21 or 1.5% of the population.

There were three hundred and ten individuals with disabilities, recorded in the 2000 US Census. In the 21-to- age- 64-age group, there were 185 individuals or 6.6% of the town's residents in this age group listed as having a disability. In the age 65 or older age group, there were 402 individuals total. Of this group, 79 or 19.7% of were listed as having a disability.

Appendix C is the Massachusetts Department of Housing and Community Development's "Community Profile" (2000) and additional census information and data for Carlisle.

2.4 Housing Characteristics

The 2000 census counted 1,655 total housing units in the town of Carlisle of which 93.8% were owner-occupied, representing a considerably higher level of owner-

occupancy in 2000 than that for Middlesex County (61.7%) and for the Boston region (57%). Moreover, almost all of the existing housing units were in single-family detached structures, 1,573 or 95.0% of the housing stock, also significantly higher than the levels for the County and region at 48.9% and 44%, respectively.

Of the 1,647 year-round housing units, the 18 units the state currently counts as affordable were all created as part of the *Carlisle Village Court* development. These 18 units comprise 1.09% of Carlisle's current housing stock. The Carlisle Elderly Housing Association built this project on a two-acre, Town-owned parcel in the early 1980s, financed by the U.S. Department of Housing and Urban Development (HUD) and the Farmer's Home Administration, also with some generous private donations. The 18 units, located in three two-story buildings, are all one-bedroom apartments for seniors, and two of these units are handicapped accessible. None of the buildings has an elevator. The development is managed by the Hodges Company.

There are several vacancies per year with eight applicants currently on the deeply-subsidized waiting list, two of whom need first floor units (cannot use stairs)². 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 which is 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. The Hodges Company indicated that the waiting time for a deeply subsidized unit is minimally several years longer for those seeking a ground floor unit. Affordable housing opportunities also are limited and in some cases, non-existent for Carlisle seniors willing to relocate to neighboring towns. Aside from the immediately recognizable issues such as: having to move away from one's friends and possibly family; move away from religious organizations and clubs; and the difficulty which seniors have keeping in touch with friends when they are no longer able to drive. Carlisle's neighboring housing authorities (Acton, Bedford, Billerica, Chelmsford, Concord and Westford), have seven to ten-year waiting lists for non-local preference deeply subsidized senior affordable housing (See Appendix D).

The Town of Carlisle was also involved in the development of another housing project, *Malcolm Meadows*, which was built under the Senior Residential Open Space Bylaw promoted by a volunteer group called Carlisle Senior Housing Options that was formed to create housing for area seniors. The bylaw allows a 50% increase in housing density under certain conditions. Using this bylaw the developer built 12 condominium units for residents age 55 and over, in the mid-1990s. The housing was clustered on four acres of a 38-acre parcel and, therefore, had the added benefit of preserving substantial amounts of open space as part of the development. While these units cannot be counted as part of the Town's Subsidized

² As of March 4, 2008, there were eight income eligible names for the deeply-subsidized units on the Village Court rental development waiting list. Two of the applicants need first floor units, as they are not able to use stairs. Information supplied by Ms. Shelley Freeman, of the Hodges Company.

Housing Inventory, they are priced below market due largely to the higher density that allowed for some economies of scale and because of their relatively smaller size, as restricted by the bylaw.

In the late 1980s, Carlisle established a public housing authority to promote affordable housing. In 1989, the Carlisle Housing Authority worked to establish an accessory apartment bylaw and to allow such units through a special permit process. Since that time 12 permits have been issued, although at this point in time none of them can at this time be counted as part of the Town's Subsidized Housing Inventory. The Town of Carlisle is currently in the process of applying to the DHCD Local Initiative Program (LIP), in order to have these affordable accessory apartments (with eligible income-certified tenants) be counted in its Subsidized Housing Inventory and toward its DHCD Affordable Housing Production goals.

Housing prices are among the highest in the state. The median single-family house was almost \$730,000 as of the end of 2007, down in fact from about \$830,000 in 2005 and 2006, and at about the same level as 2004. To afford this median price under conventional lending terms, a household would have to earn approximately \$230,000.

While the rental market is small, 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. Katahdin Woods, an older rental development in Lexington, is commanding rents of up to almost \$3,000.

The Benfield 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 airport is in Bedford and Boston. A Site Context Plan is provided as Appendix E.

The area to be developed for housing is approximately 4.39 (more or less) acres and is located on South Street, (Plan Book 212, Plan 82) also known as Lot 1 of the Benfield Land. The Benfield Land involves a 45.23-acre (more or less) parcel that was purchased by the Town with Community Preservation Act Funds, after the acquisition was approved by Special Town Meeting in 2004. The Benfield Task

Force3 subsequently developed the Land Use Master Plan for the parcel that was approved by the Carlisle Town Meeting in May 2005. In Fall 2005, a blue spotted salamander (BSS) was identified and reported to the Massachusetts Natural Heritage Endangered Species Program (NHESP). Further investigation revealed the presence of several vernal pools on the property. As a result, in fall 2006, a Special Carlisle Town Meeting approved the amendment of the Master Plan, and the original lot that had been set-aside for Community Housing (M.G.L. Chapter 44B) was transferred from the rear of the Benfield parcel to the front, directly abutting South Street, now known as Lot 1.

Lot 1 abuts Lot 2, an 11.83 (more or less) acre parcel that has been set-aside for Open Space. Lot 2 abuts Lot 3, a 3.08 (more or less) parcel that has been set-aside for recreational purposes. Lot 2 also abuts Lot 4, a 25.68 (more or less) acre parcel set-aside for Conservation Land. For the Town of Carlisle's title and legal description, see the deed recorded with the Middlesex North Registry of Deeds, Book 12190, Page 034 (Appendix F). The property is shown on a surveyor's map and sketch plan (Appendix G). A surveyor's map of the entire Benfield Land, including Lot 1, done by MetroWest Engineering, Inc. and dated June 26, 2007, is available at the Town of Carlisle Town Hall, 66 Westford Street. A copy of the plan also may be obtained at Middlesex North Registry of Deeds in Plan Book 225 Page 95.

Town Meeting approved the Benfield Master Plan, which is the framework for development guidelines included in this RFP. The proposed Benfield development will likely require a number of regulatory waivers and the Carlisle Housing Authority and Town of Carlisle are committed to supporting all necessary applications and appeals needed to build the project as outlined in the approved plan. Rizzo Associates prepared the Phase I Environmental Site Assessment for the Benfield Housing (see Appendix H). The report, dated January 28, 2004, provides a summary narrative that describes the overall Benfield Land site; the Authority's housing site; environmental constraints and development issues; and site planning considerations. Winslow Architects, Incorporated developed the Benfield Housing and Land Use Schematic Plan in concert with the Benfield Task Force. The Benfield Task Force was a committee of town leaders and volunteers, appointed by the Board of Selectmen, which worked with consultants and residents in order to review preliminary affordable housing possibilities for the town-owned Benfield parcel. This schematic plan includes architectural design guidelines, environmental siting constraints, and a utility connection plan.

³ The task force was created in 2003 to develop a master plan for siting housing, recreation and conservation. It included members from the Housing Authority, Planning Board, RecComm, ConsComm, Board of Selectmen as well as neighborhood representatives. It conducted extensive hearings, held two town-wide planning days and commissioned traffic, architectural and archeological studies of the site.

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 Lot 1 is about 4.39 acres. This area is bounded by private residences to the south, woodlands and meadows to the east, single-family residences to the west and finally South Street to the north. The housing site, Lot 1, is located on the front of the parcel and is considered developable and is substantially flat. The southeast corner of the parcel is modestly impacted by vegetated wetland protected areas. The buffer zone surrounding this wetland shall not be developed. Lot 1, hereinafter referred to as the Development Lot, is illustrated on the surveyor map and sketch plan (Appendix G).

Lots 2, 3, 4 - Conservation and Recreation Restrictions

The **Conservation and Recreation Restricted areas that include Lots 2, 3, and 4**, encompass approximately 41 acres, and are located south and east of the Development Lot. These lots include are comprised of a mix of open fields (two), woods, heavy brush and wetland areas. The woods on the parcel include a vernal pool where a protected species, the blue-spotted salamander, was located a year after the property was purchased by the Town of Carlisle. These lots are a great visual and recreational amenity, and it is the intention of the Town to have them remain as open space/conservation land, allowing only for the development of a single recreation field. It is anticipated, and provision has been made in the Conservation and Recreation Deed Restrictions, that both a public water supply well and septic system will be placed in the Conservation and Recreation Restriction areas on Lot 4 of the parcel, in the upland areas of the site.

2.5.1 Neighborhood Description & Adjacent Uses

The community around the property is an area of modest and larger homes, sub-divisions (shared driveways), woodlands, and some commercial (high technology).

2.5.2 Utilities/Infrastructure

It is anticipated that the septic leaching field necessary for this development will be built on Lot 4, adjacent to the property. It was purchased and will be used for open space, and developer's leach field design and construction must take this into account. See restrictions on use of Lot 4 elsewhere in this document.

Utility	Provider	Location
Sewage	On-site	Benfield 4
Water	On-site	Benfield Lots 2, 3 or 4.
Electric	NSTAR	South Street
Gas	Keyspan	⁴
Telephone	Verizon	South Street
Cable TV	Comcast	South Street

A public water supply well must be constructed on the site. From initial investigations, it seems that adequate area and buffer zones exist to provide wellhead protection in part of the upland area in the Open Space Parcel on Lot 4. The potential location for this public water supply well is shown on the surveyor's sketch plan and map (Appendix G)

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:** The western portion of Lot 1 borders an area of conservation land located on adjacent Lot 3. Various roads and cart paths cross this part of the property, which contains woodlands, meadows, large areas of vegetation and some wetlands. This portion of the property shall remain undeveloped and shall serve as public recreation land. It is anticipated that a single recreation field will be developed in this area.

⁴ A gas line branches off Concord Road, continuing for a short distance on South, but terminates well short of the Benfield property.

- **Upland Area within the Open Space Parcel:** A Phase I Environmental Site Assessment has been done by Rizzo Associates (2004) and no negative environmental conditions in connection with the parcel were revealed. The majority of the parcel is to remain undeveloped and to be used for passive recreational purposes. A single recreation field may be developed and maintained on Lot 3. The undeveloped area is the potential location for a public water supply well and septic system.
- **Topography:** The property ranges in elevation between 45 to 63 meters. Lot 1 is essentially flat and has been used for agricultural purposes in the past.
- **Wooded Areas:** Existing trees, e.g. four-inch caliper at four feet, should be maintained whenever feasible. Trees shall be maintained to buffer new development from adjacent residential neighbors wherever possible.
- **Drainage:** Soil Suitability for On-site Sewage Disposal Tests were conducted by the Commonwealth of Massachusetts and witnessed by the Agent for the Carlisle Board of Health with the determination that four percolation tests passed.
- **Water Flow:** The anticipated direction of local groundwater flow is to the south and southeast of the property toward Spencer Brook and away from Lot 1.
- **NHESP Habitat:** On October 25, 2005, a record element occurrence was reported by an abutter and accepted into the Program's database indicating that the habitat on the site was presumed significant for blue-spotted salamander. This area is well-removed from Lot 1 and located deep within the 41-acre Conservation and Recreation Restriction portion of the property.
- **Residential Neighbors:** Several residential neighbors abut the site, to the northeast, north and to the west. 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: siting the development as far from South Street as possible, providing evergreen "Christmas-tree" screening from the road, screening parking from the South Street, etc.

2.5.4 Floodplain

The property is within the 500-year floodplain area.

2.5.5 Easements

Title to Lot 1 is subject to a Declaration of Easements recorded in Middlesex North Registry of Deeds Book 21698 Page 202. The Declaration contemplates development of a common access road to serve all four lots, as stated therein. 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 dedicated as a public way and also must be located so as to coordinate with development plans for Lots 2 and 3 and access requirements for Lot 4.

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 Property is located in a Residence B District. The table below is a summary of the requirements, detailed in the Zoning Bylaws, as it would pertain to the development of 26 dwelling units

Category	Provision
Minimum Lot Size	2 Acres /44 acres of contiguous upland
Frontage	250 feet
Multi-family	Prohibited
Maximum Height of Building	40' or 2.5 stories or 45' and 3 stories under certain conditions.
Lot Line Setbacks	40' minimum

The existing zoning does not permit the *per se* development of multi-family and allows only very limited senior cluster housing. It is anticipated that the designated developer will amend the zoning by one of two methods:

1. Apply for a Zoning Overlay area.
2. Apply for as a Local Initiative Program Development.

The Town would like to work with the designated developer to determine which permitting approach such as the Local Initiative Program or "friendly Chapter 40B process" will best serve the needs of the Town and the proposed

development and then obtain approval, if necessary, through the Zoning Board of Appeals or through Town Meeting.

Town Meeting has previously voted to purchase the land for affordable housing with Community Preservation Funds and put in place Affordable Housing Restrictions for the Property. Town Meeting also endorsed development of no more than 26 dwelling units for the property.

A comprehensive permit and/or zoning overlay district would allow the development of 26 dwelling units with appropriate setbacks from the adjoining residential property. Cluster housing and multi-family buildings would be allowed.

3. Development Guidelines

The Development Guidelines presented in this section reflect the development objectives and desire of the Town to promote the development of senior 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.

3.1 Programmatic and Use Guidelines

The Authority will consider proposals for senior rental housing of a variety of building types and funding models. However, the total number of units must be 26. 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 26 units of senior rental housing;

- At least 25% of the units must be affordable at no more than 80% of AMI and the balance of the units may serve the same population or less, but the remaining 75% of the units cannot serve income levels higher 100% of AMI⁵.
- 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 and propose the mix of units based upon real financing options.
- Preference for Carlisle residents should be provided to the extent permitted by law.
- All units must count towards Carlisle's Affordable Housing Planned Production Plan (AHPPP) production goals in the DHCD Subsidized Housing Inventory.
- The development should attempt to incorporate the spirit of Carlisle architecture and open space.

⁵ The Benfield Parcel was purchased with Community Preservation Funds. The Affordable Housing Restriction placed on the parcel allows for "community housing" which is no more than 100% of the AMI under M.G.L. Chapter 44.

- The development should contain a common room and other tenant amenities.
- There should be space for an office for provision of supportive services.

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. At the same time, the Authority is concerned about negative impacts on the neighborhood, building character, and other factors.

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 will be paved and will continue as an unpaved road past the development to a possible future town playing field on Lots 2 or 3. The design should consider possible future opportunities for the senior residents of the development to enjoy being near the activities taking place at the abutting playing field and to provide access to Lot 4.

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

- **Rental Buildings**

One or more buildings of one or two stories, resembling traditional New England style architecture. Each multi-story building should have an elevator. Each building and unit must be handicapped accessible to the extent feasible or required by law. Apartments should be a mix of 1 and 2 bedroom units. Each building should contain laundry facilities.

- **Common Room**

A common room where residents could have larger gatherings and recreational opportunities (with room for items such as a ping pong table and/or card game tables) should be provided in an area accessible to all residents.

- **Supportive Services Office**

An office out of which the supportive services provider can operate.

- **Resident Parking**

Appropriate residential parking should be provided and screened from the South Street view.

Appropriate visitor parking should be provided screened as much as practical from South Street.

- **Bus/Van Stop**

Locate in area accessible to all residents.

- **Landscaping and Green space**

A natural landscaping style, consistent with surrounding environment and character of Carlisle, with flowering plants and bushes for three seasons should be used. Low water use and low maintenance landscape plantings should be used wherever possible. Mowed lawn areas shall be minimized to areas used for recreational purposes and private use.

- **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. Town of Carlisle Scenic Road Planning Bylaws require preserving trees with a four inch caliber at the four foot level within the South Street (which is a Scenic Road) right-of-way. A buffer shall be provided between adjacent neighbors and the new development and between South Street and the new development.

3.2.2 Infrastructure Guidelines

- **Driveway**

The driveway from road should be paved and have a low visual impact on South Street. It shall be of the minimum width acceptable to the Town. This roadway is anticipated to be accepted as a town-owned way in conjunction with the eventual extension of an unpaved, three-season road connecting to a town-owned playing field to be constructed in the future on either Lot 2 or 3 and to provide access to Lot 4.

- **Water Supply**

Community well(s) may be dug on Lots 2, 3 or 4 and piped to the development.

- **Septic**

A septic system with a leaching field is to be located on Lot 4, subject to the requirements that the resulting system should follow the natural contours of the land as much as possible. Successful percolation tests have been performed on Lot 4. Any existing trees should be preserved to the maximum extent possible.

- **Storm water**

Storm water management shall be consistent, in both wetland and non-wetland areas, with DEP Storm Water Standards and Handbooks. Low impact development designs and technologies should be used.

3.2.3 Character and Material Guidelines

- **Stone walls**

Any existing stone walls should be retained, if 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 be the traditional New England style building patterns, scale and character found in the older areas of Carlisle (not the newer developments). The architecture should be sensitive to the overall scale and style of the South Street neighborhood, 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.

- **Indoor Lighting**

LEED certifiable 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**

LEED certifiable 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 three stories, and in any case should be sited to minimize the visual impact.

- **Heating, Ventilation and Air Conditioning:**

The development should be designed and constructed with a LEED certifiable energy-efficient HVAC system.

3.2.4 Other Project Goals and Design Principles

- **Green Building**

Project should use high performance building technologies and should be as "green" and LEED 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 Carlisle Housing Authority will review all proposals in as expeditious a manner as possible and get back to all respondents in writing of its decisions within 30 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 Project 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 Carlisle Housing Authority.
10. Close on construction financing.
11. Begin construction.
12. Oversee marketing of the units, the fair housing lottery and tenant selection process. Complete construction, securing occupancy permits and delivering units to tenants.

The Authority expects that the selected development team will, upon execution of a development agreement, to move quickly to undertake and complete pre-development activities and start construction at the earliest feasible date. The proposed development should occur within a reasonable timeframe but in no event exceed 36 months unless waived by the Housing 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 August 13, 2008 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 "Carlisle Housing Authority, Benfield Property Development Proposal" on the outside of the envelope. One original and five copies of the complete proposal must be received by 2 P.M. on October 15, 2008, at the same location addressed to –

Ms. Madonna McKenzie, 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 Housing Authority, at its discretion, may 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 Ms. Madonna McKenzie, Town Administrator, at the address listed above, received prior September 24, 2008. 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 who has requested a copy of the RFP.

4.2 PRE-SUBMISSION CONFERENCE

A Pre-Submission Conference will be held at 10 A.M. on August 28, 2008 at the Carlisle Town Hall, 66 Westford Street. A locus map and directions to this location are included in Appendix A. The Carlisle Housing 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 in the form included in this RFP as Appendix I. Responses to all items listed in Section 4.4 through 4.9.
- Current Workload Form (see Appendix J)
- Disclosure of Beneficial Interests Form—M.G.L. c.7,40J (see Appendix K)
- Statement of Tax Compliance Form – M.G.L. c. 62C, 49A (see Appendix L)
- Certificate of Non-Collusion Form (see Appendix M)

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 take the Lease to 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 affordable housing 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 Carlisle Housing 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 J 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 its compliance with laws and other governmental requirements.

- 13) Describe any procedures that relate to your 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 Lot 1 and 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 apartments 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 per state guidelines. The developer will be required to show what measures will be taken to ensure that the property will be managed to continue to provide preference for Carlisle residents to the extent permitted by state and federal law and to maintain the building and grounds.

Also describe how your firm handles post-construction complaints by buyers and tenants on completed projects. What is your firm's turn-around time for responding to complaints? How do you monitor service responses?

4.9 Financial Proposal & Business Terms

It is anticipated that Lot 1 of the Property will be "ground-leased." Upon the signing of the ground lease, the Designated Developer will be required to provide the nominal payment and performance bond, 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 state or subsidy programs. These bonds or equivalent will be released when the development is complete. Developers should assume that the Property would be conveyed in as-is 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. On May 5th, 2008 Carlisle Town Meeting approved up to an additional \$425,000 of Community Preservation Act funding to be used toward senior affordable housing infrastructure, e.g. septic system, well, and/or a road. These funds will be held by the Town of Carlisle Affordable Housing Trust and released in stages, once necessary infrastructure permitting has been acquired. Developers will need to demonstrate the need for these additional town funds in their proposal pro formas; and
- 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.

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 housing developer or contractor of at least two projects involving the construction of at least eight (8) 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 award of the lease. If a firm believes that the RFP requires the disclosure of technical, proprietary, or trade secret information that the firm is not willing to make public, it may submit such information in a separate envelope, clearly marked "Confidential Corporate Information," which will be returned to the firm following the award 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 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 new multi-unit 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 multi-family housing 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 multi-family housing construction; combined team has had a significant role in at 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 \$3 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 26 units of senior rental housing in this proposed 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 Benfield 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 Benfield 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.

5.3 CONDITIONS, TERMS AND LIMITATIONS

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

- 5.3.1 Lot 1 on South Street is to be leased in "as is" condition. The Authority makes no representation whatsoever as to the physical condition of the site.
- 5.3.2 The proposed 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 as amended from time to time.
- 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 5.4 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 not to review 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 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, as the same may be amended from time to time.

5.4 SELECTION PROCESS

The main objective of this Development is to provide quality senior affordable rental housing for residents of Carlisle and the surrounding area where escalating housing market values are making housing that is affordable to seniors as well as working families a scarce commodity. In the Town of Carlisle and surrounding areas affordable senior 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 housing for retired 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 Carlisle Housing Authority will coordinate the review and selection process leading to a designated developer to undertake the development of Lot 1 of the Benfield 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 Housing 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 Housing 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: Madonna McKenzie at 978-371-6688, [mail to: mmckenzie@carlisle.mec.edu](mailto:mmckenzie@carlisle.mec.edu)

Carlisle Housing Authority Request for Proposal
August 13, 2008