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2 **Martha’s Vineyard Commission in collaboration with the towns of Aquinnah,**  
3 **Chilmark, Edgartown, Oak Bluffs, Tisbury, and West Tisbury**

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5 **Request for Proposals - Martha’s Vineyard Housing Needs Assessment**  
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8 **1. Introduction**  
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10 The Martha’s Vineyard Commission (the Regional Planning Agency of Dukes County), in  
11 collaboration with the six towns of Martha's Vineyard – Aquinnah, Chilmark, Edgartown, Oak  
12 Bluffs, Tisbury, and West Tisbury – is seeking the services of a qualified and experienced  
13 consultant to undertake a study and analysis of the community housing needs of Martha’s  
14 Vineyard. The MVC seeks responses from qualified firms or individuals.  
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16 An Island-wide housing needs assessment for Martha's Vineyard, entitled “Preserving  
17 Community”, was prepared in 2001 and was updated in 2005. We now want to prepare a new  
18 needs assessment that not only reflects past trends but is based on current conditions, significantly  
19 changed since the 2007-2009 national recession.  
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21 The objective is to analyze current housing needs for affordable housing and community housing.  
22 The study should focus on rental and homeownership opportunities for both affordable and  
23 community housing for rental housing and homeownership opportunities from two perspectives:  
24 within each town and for the Island as a whole. Town specific data and assessment will be  
25 valuable to each town and, taking them in the context of Island-wide needs will strengthen their  
26 usefulness.  
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28 Affordable housing is defined by the Commonwealth as housing for those at 80% or less than the  
29 Area Median Income (AMI) and community housing is defined as housing for those earning up to  
30 150% AMI, i.e. affordable plus 81% - 150% AMI. Note that in 2004, the state legislature  
31 adopted special legislation to allow Nantucket and Dukes Counties to place perpetual deed  
32 restrictions for those earning up to 150% AMI.  
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34 We want to expand the original study to deal not only with the housing needs of the year-round  
35 workforce, but also of independent retirees, seniors, veterans, and individuals with special needs.  
36 We also want to evaluate the effectiveness of past programs, projects and strategies; look at the  
37 capacity of existing housing organizations; and formulate recommendations on how to best  
38 leverage community assets to establish long-term and financially sustainable community housing  
39 policies, programs, and strategies.  
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41 The study will deal with the compilation and analysis of information, and the formulation of  
42 recommendations, in the following areas:

- 43 1. Demographic and Economic Data,
- 44 2. Current Housing Data,

- 45 3. Future Housing Needs,
- 46 4. Effectiveness of Past Projects and Programs,
- 47 5. Capacity of Existing Organizations,
- 48 6. Recommended Policies, Programs, Projects, and Other Strategies.

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50 The study should provide comparisons between the Vineyard and other Massachusetts regions in  
51 addition to other seasonal tourist communities. The study should refer to the 2001 and 2005  
52 Housing Needs Assessment, the MVC's Island Plan, best practices in other communities,  
53 information from stakeholders, and other relevant planning resources. (Note: the two previous  
54 needs assessments and the Island Plan are available on the MVC website:  
55 [www.mvcommission.org](http://www.mvcommission.org).)

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57 The study is funded by the Commonwealth of Massachusetts Department of Housing and  
58 Community Development's District of Local Technical Assistance Grant (DLTA) through the  
59 Martha's Vineyard Commission, all six Vineyard towns, and other private funding sources. A  
60 Study Committee will manage the project and the MVC will be the Fiscal Agent.

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## 62 **2. Services to be Provided**

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64 This section of the RFP outlines the content that the consultant should deal with in this study. Note  
65 that the Study Committee is open to having the material presented with a different organization,  
66 provided everything has been included. The Study should provide information for each town, and  
67 for the Island as a whole.

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69 The study will deal with the following types of community housing and housing needs:

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2.1 Demographic and Economic Data: The consultant should compile the most relevant data  
from the 2010 Census and other resources, such as:

- Population
- Age demographics (particularly over 65 retirement community)
- Family characteristics
- Employment
- Wages and household income

2.2 Current Housing Data: The consultant should compile the most current town-specific and  
Island-wide information for each of the housing types listed above. If specific data is not

88 available, the consultant should work with the Study Committee to make best estimates.  
89 This data should include:

- 90 • Numbers of housing units by size, type, and town;
- 91 • Housing occupancy - year-round and seasonal, homeownership and rental;
- 92 • Housing costs and affordability gap;
- 93 • Waitlist data from Dukes County Regional Housing Authority (DCRHA), Morgan  
94 Woods, Island Elderly Housing (IEH), Aquinnah Wampanoag Tribal Housing  
95 Authority and other housing providers;
- 96 • Information about displacement of year-round residents by a seasonal population  
97 (Homelessness caused by "Island Shuffle"): renters and owners, vacationers and  
98 seasonal employees.

100 2.3 Future Housing Needs: The consultant should analyze trends to project future housing  
101 needs for each of the housing types listed above, including both rental and  
102 homeownership for each town and the entire Island. This should include identifying  
103 community housing objectives and the number of housing units to be developed over the  
104 next ten years including approximate costs. These needs should be identified town by  
105 town and Island-wide.

107 2.4 Effectiveness of Past Projects and Programs: The consultant should analyze the short,  
108 medium, and long-term effectiveness of past housing projects and programs on Martha's  
109 Vineyard including a comparison between rental and homeownership opportunities; the  
110 duration of affordability restrictions (e.g. thirty years versus perpetuity); level of  
111 affordability restrictions (percentage of AMI), a comparison of the construction of new  
112 housing and use of existing buildings including CDBG housing rehab; a comparison  
113 between single-family and multi-family housing; a comparison of town and rural locations;  
114 a comparison of scattered site and larger scale development projects, and the use of  
115 rental subsidy programs. The consultant should propose quantitative and qualitative  
116 measures of effectiveness such as the number of people served as well as other social,  
117 health, and human benefits to individuals and to the Island community.

119 2.5 Capacity of Existing Organizations: The consultant should analyze the structure and  
120 capacity of the Island's more than twenty affordable/community housing organizations  
121 including their programs, access to funding (e.g. public funding, CPA, state and federal  
122 grants, private fundraising) and other resources (e.g. land and infrastructure),  
123 organization capacity, administration, programs, and completed projects. Make  
124 recommendations as to which organizations are best placed to take on which types of  
125 programs, projects, and strategies, and how their capacities could be improved.

127 2.6 Recommended Policies, Programs, Projects, and Other Strategies: The consultant should  
128 summarize the findings and, based on the above analysis, as well as an analysis of Island  
129 Plan strategies, zoning regulations, and best practices used in similar communities, make  
130 recommendations as to the most promising town-specific and Island-wide policies,  
131 programs, projects, and other strategies for serving the Island's community housing needs.

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2.7 Preparation of Interim and Final Reports: An interim report should be submitted outlining the status of the study and including preliminary data for objectives 2.1 and 2.2. The final report should incorporate the results of the study with a narrative and illustrations (such as charts and tables), presented in a way to be understandable to a decision-maker or layperson without special expertise in these issues. Additional data and supporting information could be provided in appendices. The dates for submission of these reports are found in section 3.3 of this RFP.

**3 Logistics**

3.1 Study Committee: A Study Committee will oversee all aspects of the study, will be the primary interface with the consultant, will provide available information to the consultant, and will help the consultant identify and facilitate the involvement of other stakeholders. It is anticipated that the Study Committee will be made up of one representative from each town of Aquinnah, Chilmark, Edgartown, Oak Bluffs, Tisbury, and West Tisbury, as well as one representative from the Dukes County Regional Housing Authority, and Martha's Vineyard Commission.

3.2 Stakeholders' Input: The consultant should use surveys, interviews, and/or focus groups to solicit input from stakeholders including:

- Community housing organizations,
- Community housing recipients and people on waitlists,
- Employers and other members of the business community,
- Health and human service providers.

3.3 Timetable: The Consultant should provide services according to the following schedule.

- Provide an interim report by December 15, 2012.
- Provide a draft final report (pdf) for review and comment by the Study Committee by no later than February 15, 2013. The Study Committee will provide comments by March 30, 2013.
- Provide a final report (pdf) reflecting those comments no later than March 15, 2013.
- Delivered ten copies of the printed report no later than the first week of April 2013.

3.4 Budget: The maximum budget for the study responding to the above scope of services is not to exceed \$30,000. The consultant may bill either at the end of each phase outlined in Section 2, or on a monthly basis.

3.5 Hourly or Daily Rate: Should the need arise, during the course of the study or after it is completed, the Study Committee may identify the need to use the services of the consultant to carry out additional related work beyond the scope described in this Request for Proposal. The consultant is requested to submit hourly or daily rates for carrying out such

176 additional work. The MVC reserves the right to ask the same consultant selected to do the  
177 original study to carry out such additional work without going through a new selection  
178 process.

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180 **4. Instructions to Bidders**

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182 4.1 Minimum Qualifications: The consultant must have at least five years of experience in the  
183 field of housing needs assessments.

184 4.2 Expression of Interest: A brief letter or email indicating that the consultant is anticipating  
185 submitting an offer of services, and including the consultant's complete contact  
186 information. The expression of interest should be received by the MVC within 14 days of  
187 the RFP's posting.

188 4.3 Offer of Services: The proposal should include the following elements:

- 189 • A letter of intent that addresses the scope of work and the evaluation criteria listed  
190 below, preferably no more than six pages long.
- 191 • The cost of the work including travel and other expenses. An hourly or daily rate  
192 for additional work that may be requested.
- 193 • Additional documents that the applicant deems appropriate such as a firm  
194 description, biographic information of people who will work on the project,  
195 examples of previous work, and references.
- 196 • Signed Tax Compliance and Non Collusion certificates (see Attachment A).
- 197 • Detailed Budget including number of hours and hourly rate for each person who  
198 will work on the project, travel expenses, other out-of-pocket expenses.
- 199 • Hourly or daily rate for possible additional work as described in Section 3.5  
200 above.
- 201 • References.

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203 4.4 Evaluation Criteria: The consultant will be selected by the Study Committee. Bidders will  
204 be evaluated based on the following criteria:

- 205 • Experience or participation in previous studies of housing needs assessments and  
206 other alternative housing organization analysis work (20%).
- 207 • Understanding of the mandate, proposed methodology and timeline (20%)
- 208 • Knowledge of the statutory constraints, limitations, and opportunities imposed on  
209 municipalities by Massachusetts General Laws in the area of housing (5%).
- 210 • Previous experience working for Massachusetts regional entities or municipalities  
211 on housing needs assessments or other housing studies (15%).
- 212 • Previous experience in rural, isolated, seasonal communities on housing related  
213 studies or projects (15%).
- 214 • Ability to deliver the product within the time frames outlined in this request (10%).
- 215 • Budget (15%).

216 Note that selection of consultants may be based exclusively on the written proposals, or  
217 might include interviews with some or all of the bidders.

218 4.4 Submission of Offer of Service: Submissions for consideration must be sent by email or  
219 delivered in a sealed envelope clearly marked: Martha's Vineyard Housing Needs  
220 Assessment: Work Proposal. All expressions of interest should be received by June 29,  
221 2012, 4:30 p.m. All proposal submissions must be received by July 13, 2012, 4:30  
222 p.m.  
223 • By email to Curt Schroeder, [schroeder@mvcommission.org](mailto:schroeder@mvcommission.org)  
224 • By other shipment: Martha's Vineyard Commission, 33 New York Avenue, PO Box  
225 1447, Oak Bluffs, MA 02557 (Note: Mail delivery to Martha's Vineyard can be slow  
226 and overnight delivery can be restricted.)  
227 • Fax submissions will not be considered  
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229 4.5 Disclaimer: All proposals received will be taken under consideration for award of  
230 contract at a later date. Contractors agree that their proposals shall be good and may not  
231 be withdrawn for a period of sixty (60) days, Saturdays, Sundays, and legal holidays  
232 excluded, after the opening of the proposals.

233 Review of proposals by the Study Committee shall take into account each Contractor's  
234 qualifications and references as well as the proposal submitted. The Study Committee  
235 may require submission of additional information as it deems necessary or appropriate to  
236 evaluate the proposals.

237 No award shall be made to any Contractor who cannot satisfy the Study Committee that it  
238 has sufficient ability and experience to enable it to successfully complete the project as  
239 described. The Study Committee's decision or judgment on these matters shall be final,  
240 conclusive, and binding.

241 No protests regarding the validity or appropriateness of this invitation for proposals or of  
242 the project specifications shall be considered unless said protest is made in writing and  
243 submitted to the MVC Administrator prior to the date for the submission of proposals.  
244 Should a protest be rejected or disallowed, an appeal may be made provided said  
245 appeal is filed in writing with the MVC within two (2) business days of the decision.

246 The Study Committee reserves the right to accept or reject any or all proposals received,  
247 to waive any informalities if it is in the best interest of the Committee to do so, and to  
248 make an award as the interests of the Committee require.

249 The Study Committee encourages women and minority-owned businesses to submit  
250 proposals.  
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252 4.6 Further Information: if you have any questions, please email them to Curtis Schroeder  
253 MVC Administrator, [schroeder@mvcommission.org](mailto:schroeder@mvcommission.org), before June 29, 2012. Responses to  
254 questions by those, who have submitted an expression of interest, will be sent by the MVC  
255 on or about July 6<sup>th</sup>.  
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258 Martha's Vineyard Commission  
259 33 New York Avenue, PO Box 1447, Oak Bluffs, MA 02557  
260 Telephone: 508-693-3453  
261 Fax: 508-693-7894  
262 [www.mvcommission.org](http://www.mvcommission.org)  
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264 **ATTACHMENT A**

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**CERTIFICATE OF NON-COLLUSION**

269 The undersigned certifies under the penalties of perjury that this bid or proposal has been made  
270 and submitted in good faith and without collusion or fraud with any other person. As used in this  
271 certification, the word "person" shall mean any natural person, business, partnership,  
272 corporation, union, committee, club, or other organization, entity, or group of individuals.

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275 Signature of Individual submitting proposal

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277 Name of business

Date

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**TAX COMPLIANCE CERTIFICATION**

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284 Pursuant to M.G.L. c.62C, s49A, I certify under the penalties of perjury that to the best of my  
285 knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes,  
286 reporting of employees and contractors, and withholding and remitting child support.

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289 Signature of Individual or Corporate Name

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291 Social Security Number or  
292 Federal Identification Number

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294 By \_\_\_\_\_  
295 Corporate Officer (if applicable

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298 Date