

# Draft 3-12-24 ALSKC

## TOWN OF CHILMARK REQUEST FOR PROPOSALS (RFP) Housing Development at Peaked Hill Pastures

### I. Introduction

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The Town of Chilmark (the Town), acting through its Select Board, invites proposals for the development of rental housing and possible construction of up to 4 single family homes (Homesite lots) as part of an overall project to place affordable and community housing<sup>1</sup> on approximately six to eight acres (“Site”). The Town is located on the island of Martha’s Vineyard in Dukes County, Massachusetts.

The Site is the southeast portion of approximately 24 acres of Town-owned land in the former Peaked Hill Pastures subdivision. This Town-owned land is shown on the 2023 Assessor’s Map as Map 20 Lots 47-4, 47-5, and 47-17, which are in the Agricultural Residential District III see Attachment B). In addition to the relevant permitting boards of the Town, the Martha’s Vineyard Commission (MVC), a regional planning body, also approved the Peaked Hill Pastures subdivision as a Development of Regional Impact (DRI), and thus the Site is subject to the MVC’s continuing jurisdiction.

According to the MVC, the Site is not located within a watershed area. No recent environmental or historic reviews of the Site have been completed. The Site has access to water.

At the Chilmark Annual Town Meeting on April 25, 2022, a majority of residents present and voting approved Warrant Article 25, which provided for the approval in concept of using six to eight acres of this Town-owned property for an affordable and community housing development, consisting of up to ten<sup>2</sup> rental units with not more than 20 bedrooms and four Affordable Homesite lots. The warrant article stated that two of the four homesite lots could be “turnkey” homes constructed by the developer of the rental units.<sup>3</sup> The Town intends that the rental units, homesite lots, and the associated roads and parking areas and landscape buffers cover not more than six to eight acres of the Town property. The balance of the Town land will be reserved for continued use of the existing ball field, open space and possible future uses.

The Town is making the Site available under G.L. c. 30B, § 16. Through this Request for Proposals (RFP), the Town intends to offer a portion of the Site under a Land Disposition Agreement (LDA) and long-term Ground Lease to the qualified organization (the “Developer”)

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<sup>1</sup> Affordable housing is herein defined as serving people at or below 80% of areawide median income and community housing is defined as serving people between 80 and 150% of areawide median income. See Appendix A for a chart of Dukes County Areawide Median Incomes by household size and eligibility for different housing programs. Affordability for both affordable and community housing is defined herein as monthly housing costs not exceeding approximately 30% of income.

<sup>2</sup> This RFP is for 9 not 10 rental units based on the zoning bylaw, recommendations of the Town’s RFP Committee, and Select Board approval.

<sup>3</sup> Per the recommendation of the Town’s RFP Committee, and Select Board approval, the RFP includes possible construction of up to 4 single family homes in order to provide maximum flexibility to the four homesite recipients. After the homesite recipients are selected, the total number of homesites will be confirmed.

that submits a proposal most favorable to the Town for the rental units and possible construction of up to four single family homes.

The Developer shall be responsible for permitting, funding, and the construction of the rental portion of the development and for long term operation of the rental units. They will be responsible for associated infrastructure (road, utilities, septic system design) for the rental and homeownership portions of the site. They may also have responsibility for construction of up to four single-family dwellings on the Affordable Homesite lots, subject to homeowner choice.

A Town Evaluation Committee will review all proposals received, and make a recommendation to the Select Board. The Awarding Authority for this RFP shall be the Chilmark Select Board. The lease of the Site and the overall project are subject to acceptance by the Select Board and final approval at a Chilmark Town Meeting.

Attachments to this RFP expand on the subjects and samples of documents mentioned within this RFP. The attachments are in Section IX.

## II. General Information

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Proposals must be received at the Chilmark Town Hall, Office of the Town Administrator, Chilmark Town Hall, 401 Middle Road, P.O. Box 119, Chilmark, MA 02535 no later than **May 10, 2024**. Responders shall submit one (1) original and six (6) copies of their proposal in a sealed envelope marked “Peaked Hill Pastures Housing Proposal,” together with a complete set of all proposal materials in electronic format (PDF files) on a thumb drive or similar portable storage device. Faxed or emailed proposals will be deemed non-responsive and will be rejected. Proposal submissions will be accepted until the date and time listed above and shall be opened the following business day. If, at the time of the scheduled opening of the responses, Town Hall is closed due to unanticipated events such as fire, snow, ice, wind or building evacuation, the response opening will be postponed until 2:00 PM the next open business day.

The Town intends to designate the Developer within sixty (60) days after response opening unless otherwise stated in the specifications or the time for award is extended by mutual consent of all parties. All proposals submitted shall be valid for a minimum period of 60 calendar days following the date established for acceptance.

All inquiries or questions regarding this RFP must be submitted in writing, by email no later than **April 26, 2024** to the Town Administrator at [townadministrator@chilmarkma.gov](mailto:townadministrator@chilmarkma.gov) acting as the procurement officer. Any changes made or clarifications required to this RFP and responses to all questions received by the Town prior to the deadline stated herein shall be provided in addenda by email to all entities that responded to the RFP.

There will be a Pre-Proposal Meeting on site, on **April 24, 2024**. Responses may be modified, corrected, or withdrawn only by written notice received by the Town of Chilmark Procurement Officer prior to the time and date set for the response opening. Modifications must be submitted in a sealed envelope clearly labeled “Modification No. \_\_\_” and must reference the original RFP response.

Responses received prior to the date of opening will be securely kept, unopened. No responsibility will be attached to an officer or person for the premature opening of a response not properly addressed and identified. Any submissions received after the advertised date and time for opening will be considered non-responsive and be returned to the responder unopened.

Responses to this RFP must include all required documents, completed and signed as required. Proposals that are incomplete, conditional, or unclear will be rejected. No award will be made to any Responder who cannot satisfy the Select Board (the Awarding Authority) that they have sufficient technical ability and sufficient financial capacity to enable them to meet the requirements of these specifications. The Awarding Authority's decision or judgment on these matters shall be final, conclusive, and binding.

The Town reserves the right to reject any and all responses and to waive any portion of responses received whenever such rejection or waiver is in its best interest.

The Town may cancel this RFP, in whole or in part, or may reject all Proposals, or may procure only some goods or services outlined in this RFP whenever it is determined to be fiscally advantageous, or if it is otherwise in the best interest of the Town.

The Town may request additional information to determine that a Responder has the technical competence, the business and technical organization, and the financial resources to successfully perform the necessary work.

The Town will not be responsible for any expenses incurred in preparing and submitting responses. All submissions shall become the property of the Town of Chilmark. All deliverables, reports, maps, and other documents resulting from this contract shall become the property of the Town.

The Developer shall comply with all applicable state and federal laws in performance of service and acceptance of the land lease from the Town, including but not limited to G.L. c. 44, § 63A, G.L. c. 60, § 77A and G.L. c. 60, § 77B.

Response to this RFP acknowledges the Responder's acceptance of all sections and requirements of this document. The selected Responder's response to the RFP will be incorporated within the LDA (see Attachment C). If the Responder's proposal does not comply with the requirements of this RFP, or if an item is not understood in any way, a copy of that section of the RFP must be included in the proposal and all its copies clearly stating the deviation, additions, or other comments.

The Town makes no representations or warranties, express or implied, as to the accuracy and or completeness of the information included in this RFP. This RFP, including all attachments, supplements or future addenda, is made subject to errors, omissions, and withdrawal without prior notice, and to changes to, additional, and different interpretations of laws and regulations.

The Tax Compliance Certification and the Certificate of Non-Collusion must be included with the response. These forms must be signed by the individual(s) with authority to act on the Responder's behalf.

### **III. Background**

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## **Chilmark**

Chilmark is a small community on Martha's Vineyard with an aging population, and a large number of seasonal residents. There is a significant affordability problem for year-round residents in Chilmark. There have been challenges attracting and retaining workers including school and medical personnel, and in making it possible for people who grew up on the Island to stay or return, in Chilmark and elsewhere on Martha's Vineyard.

Housing affordability for year-round residents of Chilmark is an ongoing concern. According to the Martha's Vineyard Commission<sup>4</sup>, the average price of a home in Chilmark increased from \$2.2 million in 2012 to \$3.8 million in 2022. The median household income went from \$59,583 in 2011 to \$114,931 in 2021. The number of year-round residents increased from 864 in 2010 to 1212 in 2020.

According to the Town of Chilmark's latest Housing Production Plan<sup>5</sup>, close to 40% (125 households) of the year-round population in Chilmark had incomes at or below 80% of areawide median income in 2016, and about 70 of those were severely cost burdened (meaning paying more than 50% of their incomes for housing). Housing affordability for year-round residents of Chilmark is an ongoing concern.

### **The Site and Our Goals**

The Site is located in the Agricultural-Residential District III zoning district of the Town, where one single-family home is permitted as of right on a minimum lot size of three (acres), with setbacks of fifty (50) feet under Section 6.0(C) of the Zoning By-laws. Section 6.10 provides an exception to the minimum lot area requirement for affordable rental housing. A copy of the present Zoning By-Laws can be found at: <https://www.chilmarkma.gov/zoning-board-appeals/pages/complete-list-zoning-bylaws>.

As noted above, the Site is a DRI under the MVC's regulations. Information on the MVC's decisions concerning the site can be located at: <https://www.mvcommission.org/dri/previous>.

The goal of this Request for Proposals is to provide affordable and community housing in Chilmark. We aim to provide rental housing and homeownership options for a range of household sizes, to meet critical community needs. Pursuant to the warrant article approving this development in concept, the rental and homeownership housing shall be made available to qualifying households with incomes up to 150% of the Areawide Median Income (AMI). At least two rental units should be for households with incomes at or below 80% of median income and at least two rental units should be for household with incomes between 100 and 150% of areawide median income. The rentals units must remain restricted in perpetuity to tenants with incomes of not more than 150% of AMI.

## **IV. Request for Proposals**

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The purpose of this Request for Proposal (RFP) is to select a Developer who can demonstrate the experience and capacity to timely and successfully:

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<sup>4</sup> Martha's Vineyard Commission 2023 Statistical Profile.

<sup>5</sup> Town of Chilmark 2018-22 Housing Production Plan.

- Conduct community outreach and design review. Before applying for permitting, the Developer shall present draft plans and specifications to the community including neighbors. The Developer will hold at least two open meetings with the community and will reach out to the neighbors (within 600 feet including those across roadways). At the open meetings, the Developer will respond to questions and comments pertaining to the Project. This meeting shall be advertised in the local papers with details as to how to attend.
- Secure all appropriate approvals and permits, including Board of Health approval. It is anticipated that this project will be permitted under the Town's Zoning Bylaw.
- Execute a Land Disposition Agreement (LDA) in a form acceptable to the Town.
- Enter into a Ground Lease with the Town upon completion of construction and issuance of Certificate of Occupancy.
- Manage or contract for the management of the **nine rental units**.

### **A. Project Description**

The rental portion of the Project must provide for nine **(9)** units with eighteen (18) bedrooms total. We envision three buildings, each with a one-bedroom unit of at least 600 square feet, a two-bedroom unit of at least 800 square feet, and a three-bedroom units of at least 950 square feet]. All rental units shall meet ADA Accessibility Standards (handicap visitable) on the ground floors and walkways.

For the rental component of the Project, the Developer shall use best efforts to assure that the maximum local preference allowed by law in the tenant selection process is observed. The developer should propose a property management plan, including an initial tenant selection process for the rental units that they will be responsible for.

The four homeownership homes should contain at least three bedrooms each and be at least 1500 square feet in size.

### **B. Design Plan**

A Site Plan prepared for the Town by Vineyard Land Surveying & Engineering, Inc. and dated **01/16/2024** presents an approximate building envelope for the rental units and locates the four homesite lots. See Attachment B for Site Plan, Site Analysis prepared for the Martha's Vineyard Commission, and Town Meeting Minutes for Article 25, 2022 Annual Town Meeting.

The selected Developer and the Town will agree upon a Design Plan and Building Envelope prior to execution of the LDA. The Design Plan must include details on the driveway and apron, and the Developer must obtain approval for the driveway and the apron from the Building Inspector and the Town's Fire Chief.

Any substantive changes from the approved Design Plan and Building Envelope made after the execution of the LDA will require written approval of the Select Board. Any changes from the approved Design Plan and Building Envelope made after the execution of the Ground Lease will require written approval of the Select Board.

The Select Board may appoint a Project Manager to oversee the work of the developer.

### **C. Roads, Utilities, and Infrastructure**

The Town is providing the land as is.

The Developer will work with the Town to prepare a final Site Plan showing the location of the rental units, parking areas, and access roads, including road access to lot boundaries of the four Homesite Lots. It is expected that there will be a single access to the overall development from Pasture Road located at the eastern boundary of the Town property. The project may not proceed until the Select Board has provided approval in writing of the final Site Plan.

The Developer will be responsible for construction of a low nitrogen advanced septic system and for the wells and water supply to serve the rental units. The road and utilities are expected to serve the complete site including the four Homesite units. The Developer will coordinate with the Town and its designated electrical engineering services provider to prepare a plan to provide adequate electric service to the site, including the rental units and the four homesite lots.

## **V. Development Guidelines It is**

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The Town has established the following quality guidelines for development of the Site. Priority will be given to Respondents who demonstrate the best ability to address these guidelines, as determined by the evaluation criteria in this RFP.

### **A. General Design and Construction Guidelines**

All structures must comply with any local applicable code, including “stretch code,” Massachusetts State Building Codes, Massachusetts Electrical Code, Massachusetts Plumbing and Heating Code, Massachusetts Fire Code, and Massachusetts Sanitary Code.

Modular, panelized construction, or traditional “stick-built” construction may be used, however, the design and materials must be in keeping with the traditional architectural style and rural character of the Town and meet the height and other limitations in the Town zoning bylaws.

### **B. Building and Unit Specifications**

The ground floor living space in the rental units and walkways must meet ADA Accessible Standards (visitability). At least one unit shall meet ADA Accessible Design Standards (livable). The site plan must include adequate off-street parking spaces (as dictated by the Town Zoning Bylaw).

### **C. Energy Efficiency and “Green” Construction**

Proposals shall provide the most energy efficient residential development within the constraints of this development. Energy Star Standards shall be adhered to in all structures. The Town encourages design plans that maximize the energy efficiency and maintenance of the housing units, specifically “green” technologies, LEED construction or near Net Zero and Net Zero

Building, including, but not limited to the addition of solar energy components, alternative energy components, and possibly fire suppression systems.

#### **D. Landscaping and Site Work**

Proposals will include finish grade (considering appropriate and reasonable drainage techniques), lawn, shrubs and appropriate driveways. All landscaping shall consist of native, sustainable, low-water species for Dukes County, Proposals shall provide a landscape plan that includes a visual buffer area along the rental property site borders of at least 50 feet.

#### **E. Readiness to Proceed and Timelines**

The Developer shall demonstrate the ability to start on the project within a reasonable timeframe after executing the LDA. Start shall be evidenced by securing of a building permit. The units shall be available to rent to eligible and qualified households no later than two years after building permits have been issued. Timelines may be extended by mutual agreement of the Developer and the Town

#### **F. Financial**

The Developer shall be responsible for all costs associated with permitting, construction, and site development and landscaping, except as noted herein. The Town anticipates contributing approximately \$2 million of funding through its Community Preservation and Housing Trust Fund resources to the project which is expected to be used, at least in part, for infrastructure and site preparation. In addition, assistance shall be provided by the Town in the form of documentation for any grant applications or subsidies for which the Developer may choose to apply.

The Developer shall demonstrate the financial capacity to manage and complete the Project. The financial disclosures described in Section VII shall be submitted as part of the proposal.

#### **G. Land Disposition and Ground Lease**

The Developer will enter into a Land Disposition Agreement (LDA) with the Town when the Awarding Authority selects the Developer. When all necessary permits are in place and a certificate of occupancy is issued, the Developer and the Town will enter into a Ground Lease. See Attachment D for a sample Ground Lease. The Ground Lease fee to be paid by the developer/owner to the Town will be \$5000 initially and \$1000 annually once the project is completed. The maximum area to be ground leased will be the rental unit lot of approximately four acres as described in this RFP, with exact specifications to be agreed upon before the Ground Lease is executed.

### **VI. Evaluation Criteria**

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The Town will apply the following evaluation criteria to its evaluation of all proposals received by the deadline stated in this RFP.

**A. Minimum Threshold Criteria**

The proposal must meet the minimum threshold criteria in order to proceed through the review process. Proposals failing to comply with one or more of the minimum criteria stated below shall be disqualified from further consideration:

- Proposals must be complete and must conform to all submission requirements.
- Proposals must provide for development of the rental units in the configuration described.
- Responder must certify compliance on all state and local taxes (see Attachment F).

**B. Comparative Evaluation Criteria**

Responses meeting the minimum criteria will be judged on the following additional comparative evaluation criteria. The Town reserves the right to award the contract to the responsive and responsible proposal which best meets the Town’s needs, considering qualifications, submittal quality, and evaluation criteria. The Select Board decision or judgment on these matters shall be final. The Town will use the comparative criterion for each rating area, and based upon these criteria, will assign an overall rating to each proposal. Each of the criteria may contain ratings of:

- Unacceptable
- Not Advantageous
- Advantageous, or
- Highly Advantageous

An “Unacceptable” rating in any one of the criteria may eliminate the proposal from further consideration.

**1) Strength of the Development and Property Management Team**

Applicants will be evaluated on the strength of the development and property management team as evidenced by experience with similar projects and properties. Experience evaluated will be primarily that of the organization’s principal (executive director, chief executive officer, or similar position) and the individual designated to lead the Project (project manager or other similar position), and to operate the project (property manager or other similar position and planned team).

- Unacceptable: Either the organization’s principal or the project manager or property management team has had no experience with similar projects within the last five (5) years.
- Not Advantageous: Either the organization’s principal or the project manager or property management team have had experience with only one (1) similar project within the last five (5) years.
- Advantageous: The organization’s principal and the project manager and property management team have had experience with two (2) or more similar projects within the last five (5) years.



- **Highly Advantageous:** The organization's principal and the project manager plus the property management team have had experience with three (3) or more similar projects within the last five (5) years.

## **2) Construction Experience**

Applicants will be evaluated based on the demonstrated extent of the organization's construction experience with residential new construction of affordable rental and homeownership projects.

- **Unacceptable:** Applicant has no construction experience with residential new construction affordable rental projects.
- **Not Advantageous:** applicant has less than five (5) years of the above stated construction experience.
- **Advantageous:** Applicant has five (5) to eight (8) years of the above stated construction experience.
- **Highly Advantageous:** Applicant has more than eight (8) years of the above stated construction experience.

## **3) Financial Experience and Capacity**

Applicants will be evaluated on the extent to which financial references verify financial capacity of applicant and the extent of their financial strength to support the most favorable terms from a construction lender.

- **Unacceptable:** Applicant has not demonstrated financial capacity by providing adequate documentation to allow reviewers to determine financial viability.
- **Not Advantageous:** Applicant has provided basic documentation regarding financial capacity however it is not clear that applicant has the financing or cash flow to adequately complete the project.
- **Advantageous:** Applicant has provided sufficient documentation to demonstrate financial viability and cash flow to complete the project.
- **Highly Advantageous:** Applicant has provided ample documentation to demonstrate financial viability and cash flow with a lending letter of interest naming this project.

## **4) Project Discussion and Cost Projections**

Applicants will be evaluated on the extent of their project understanding, especially pertaining to the goals of creating quality affordable and community housing and a project design that is in keeping with the character of the Town, as evidenced by Applicant's Project Description and Project Proformas.

- **Unacceptable:** Proposal did not adequately convey Applicant's understanding of the project goals and approach to completing the project successfully.
- **Not Advantageous:** The Proposal indicates Applicant may understand the project goals, but the materials provided are not clear enough to make a determination. Applicant's approach does not instill confidence in a plan to complete the project in a well thought out manner.

- Advantageous: The Proposal indicates Applicant will meet the project goals and show the Applicant's demonstrated understanding of the project and approach to the work required.
- Highly Advantageous: The Proposal clearly indicates Applicant's understanding of the project goals and ability to successfully meet these goals; shows the Applicant's demonstrated understanding of the project; Applicant's ability to bring leadership to the project and that their approach to the project demonstrates a creative and thorough process.

## **5) Project Discussion and Design Proposals**

Applicants will be evaluated on the extent of their project understanding, especially pertaining to the goals of creating quality affordable and community housing that is harmonious with the existing architecture of the neighborhood and the Town, and meets the Goals and Guidelines in the RFP, as evidenced by Applicant's Project Description, including Preliminary Site Plans and Architectural Plans.

- Unacceptable: Proposal did not adequately convey Applicant's understanding of the project goals, and approach to designing the project successfully.
- Not Advantageous: The response indicates Applicant may understand the project goals, but the materials provided are not clear enough to make a determination. Applicant's approach does not instill confidence in a plan to design the project in a well thought-out manner.
- Advantageous: The Project Description provided indicate Applicant will meet the project goals and show the Applicant's demonstrated understanding of the project and approach to the design.
- Highly Advantageous: The Project Description provided clearly indicate Applicant's understanding of the project goals and ability to successfully meet these goals; shows the Applicant's demonstrated understanding of the project; Applicant's ability to bring leadership to the project and that their approach to the design demonstrates a creative and thorough process.

## **6) Property Management Plan**

Applicants will be evaluated on the extent of their project understanding, especially pertaining to the goals of operating quality affordable and community housing on ground leased land that meets the Goals and Guidelines in the RFP, as evidenced by Applicant's Property Management Plan.

- Unacceptable: Plan did not adequately convey Applicant's understanding of the project goals, and approach to operating the property successfully.
- Not Advantageous: The response indicates Applicant may understand the project goals, but the property management plan provided is not clear enough to make a determination. Applicant's approach does not instill confidence in a plan to operate the property in a well thought-out manner.
- Advantageous: The Property Management Plan provided indicate Applicant will meet the project goals and shows the Applicant's demonstrated understanding of property management and operating the property effectively.

- **Highly Advantageous:** The Property Management Plan indicates the applicant's understanding of the project goals and ability to successfully manage the property; shows the Applicant's demonstrated ability to bring property management expertise to the project.

## **7) Readiness to Proceed**

Applicants will be evaluated on their ability to begin the project in a timely manner as demonstrated by the Projected Development Schedule.

- **Unacceptable:** Applicant did not provide a Projected Development Schedule.
- **Not Advantageous:** Applicant has provided a Projected Development Schedule that documents the ability to secure all necessary permitting approvals and financing within twenty-four (24) months of the project award, and construction completion within thirty-six (36) months of project award.
- **Advantageous:** Applicant has provided a Projected Development Schedule that documents the ability to secure all necessary permitting approvals and financing within nine (9) months of the project award, and construction completion within twenty-four (24) months of project award.
- **Highly Advantageous:** Applicant has provided a Projected Development Schedule that documents the ability to secure all necessary permitting approvals and financing within six (6) months of the project award, and construction completion within eighteen (18) months of project award.

## **8) Ability to Work with Local Government and Funding Sources**

Applicants will be scored according to the extent of successful experience working with government-assisted programs and funding sources during the last five (5) years.

- **Unacceptable:** Applicant has no experience working with government assisted programs and sources
- **Not Advantageous:** Applicant with less than one (1) year successful experience working with government assisted programs and sources.
- **Advantageous:** Applicant with one to five (5) years successful experience working with government assisted programs and services
- **Highly Advantageous:** Applicant with more than five (5) years of successful experience working with government assisted programs and services

## **9) Green Construction**

Proposal will receive additional consideration for green construction as follows:

- **Unacceptable:** Proposal does not meet Energy Star standards
- **Not Advantageous:** Proposal adheres to Energy Star standards
- **Advantageous:** Proposal incorporates additional "green" construction elements that surpass Energy Star standards
- **Highly Advantageous:** Proposal incorporates Low Energy Emission Definition (LEED) certified construction

## VII. Submission Requirements

Applicants must submit all of the following information:

- 1) Letter of Interest signed by all principals of the applicant organization.
- 2) Project Description
  - Project Narrative
  - Preliminary Site Plans and Architectural Plans (floor plans and elevations); 11” x 17” format.
  - Projected Development Schedule
  - Description of the proposed housing units, affordability levels, and accessibility. Affordability levels shall be stated in terms of the Dukes County percentages of Areawide Median Income as found in Attachment A.
  - Information on the Development team (i.e., developer, key consultants, property manager or company, architect, contractor, attorney, etc.), including details on previous experience of members of the team and details on similar projects completed. If an entity other than the Developer will be the property manager, the Responder must explain how property management services will be secured.
  - Preliminary property management plan including information on the management team and staffing plan.
- 3) Project Financing
  - a. **Development Financial** proforma including a sources and uses budget and 20 year operating budget proforma for the **9 rental units**
  - b. Letters of interest from lenders and funding sources with contact information
  - c. Preliminary construction cost estimate with trade item breakdown for the **9 rental** units including utilities, driveways, parking and landscaping of rental unit site and buffer areas
  - d. Estimated cost per square foot to construct a three bedroom, two bath home of not less than 1500 square feet on an Affordable Homesite lot.
- 4) Financial and Developer Information
  - a. Development Entity: The nature of the entity to enter into the LDA with the Town, and the borrower and guarantors of debt, if any. Proposals shall identify all principals, partners, co-venturers or sub-developers participating in the project, and the nature and share of participants’ ownership in the project.
  - b. Developer Financials: Most recent federal tax forms and audited financial statements
  - c. Disclosure of any past, pending, or threatened legal or administrative actions that may relate to the conduct of the Proposer, its principals, or any affiliates.
  - d. Equity: Evidence of developer’s financial capacity to cover equity requirements
  - e. References (no more than three), including the project name and location, year completed, name, title, and contact information
  - f. List/description of other real estate owned and property managed

- g. Confirmation that no local, state, or federal taxes are due and outstanding for the development team or any entity participating in the team.

5) Additional Financial and Related Party Disclosures

- a. Please identify all parties not employed by your organization who will participate in the project design and its financing, including structuring, placement of debt or tax credits, or seeking grants from governmental bodies or private sources and briefly describe their roles.
- b. For each third party identified above, please provide the names of the principals who will be providing or overseeing their work in support of the project.
- c. Describe any fees that your organization or third parties identified in (a) would anticipate receiving for work on the project including project management, oversight, structuring, or financing; state the amount of such fees and the methodology by which they will be determined; include any fees that may be paid indirectly by deductions from loan or grant proceeds or the value of any tax credits or preferences.
- d. State whether your organization or any of its principal officers or any of the third parties identified in (1) above have:
  - i) been the subject of legal or ethical complaints in connection with any real estate related or financial activities including breach of fiduciary duties;
  - ii) been a party to a bankruptcy proceeding related to real estate activities whether as an individual or as an officer or director of a corporation or partnership.

6) Forms and Certificates (Required from Responder)

- a. Certification of Tax Compliance (M.G.L. c. 62C, 49A) (Attachment E)
- b. Disclosure of Beneficial Interests (M.G.L. c.7, 40J) (Attachment F)
- c. Certificate of Non-Collusion (Attachment G)

## **VIII. Selection Process**

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All packages received by the deadline will be opened in public and logged in. All information contained in the proposals is public. The Select Board and its designees will review and evaluate all proposals that have been received by the submission deadline. Evaluation of the proposals will be based upon the information provided in the Proposer's submission in accordance with the selection criteria. Final award shall be by vote of the Select Board.

## **IX. Attachments**

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Attachment A: Areawide Median Incomes by Household Size

Attachment B: Maps, Site Information and Town Annual Meeting Vote

Attachment C: Sample Land Disposition Agreement

Attachment D: Sample Ground Lease

Peaked Hill Pastures RFP

Attachment E: Certificate of Tax Compliance Form

Attachment F: Disclosure of Beneficial and Other Financial Interests Form

Attachment G: Certificate of Non-Collusion Form

## Attachment A

The 2023 HUD **Median Family Income (MFI)** for Dukes County is **\$124,900 \***

	<b>30%</b>	<b>50%</b>	<b>60%</b>	<b>80%</b>	<b>100%</b>	<b>110%</b>	<b>120%</b>	<b>140%</b>	<b>150%</b>
<b>1 person</b>	\$27,350	\$45,600	\$54,720	\$70,150	<i>\$87,450</i>	\$100,320	\$109,400	\$127,700	\$136,800
<b>2 person</b>	\$31,250	\$52,100	\$62,520	\$80,150	<i>\$99,950</i>	\$114,620	\$125,000	\$145,900	\$156,300
<b>3 person</b>	\$35,150	\$58,600	\$70,320	\$90,150	<i>\$112,450</i>	\$128,920	\$140,600	\$164,100	\$175,800
<b>4 person</b>	\$39,050	\$65,100	\$78,120	\$100,150	<i>\$124,900</i>	\$143,250	\$156,200	\$182,300	\$195,300
<b>5 person</b>	\$42,200	\$70,350	\$84,420	\$108,200	<i>\$134,900</i>	\$154,770	\$168,800	\$197,000	\$211,100
<b>6 person</b>	\$45,300	\$75,550	\$90,660	\$116,200	<i>\$144,900</i>	\$166,210	\$181,300	\$211,500	\$226,700
<b>7 person</b>	\$48,450	\$80,750	\$96,900	\$124,200	<i>\$154,900</i>	\$177,650	\$193,800	\$226,100	\$242,250