

**REQUEST FOR PROPOSALS**  
**TOWN OF TRURO, MASSACHUSETTS**  
**2017 COMMUNITY DEVELOPMENT FUND**  
**Community Development Block Grant**

The Town of Truro invites competitive proposals from qualified consultants to provide Housing Rehabilitation Services for a Community Development Fund FY17 CDBG grant awarded by the Massachusetts Department of Housing and Community Development through its Community Development Block Grant Program (CDBG).

Complete specifications and proposal requirements are available by e-mailing [aboyn@baileyboyd.com](mailto:aboyn@baileyboyd.com) or calling the Grant Administrator at 508-430-4499 x1.

Proposals must be received no later than, 2:00 P.M. Monday November 6, 2017 at the offices of the Grant Administrator, 9 Hillside Road, Scituate, MA 02066-1020 in the manner and format as required in the Request for Proposals, and should be addressed to Cassie Boyd Marsh, Grant Administrator.

The Town reserves the right to waive any informalities in the proposal procedure, to cancel this Request for Proposal or to reject any and all proposals received deemed not in the best interest of the Town. The Board of Selectmen shall award contracts under this procurement.

The Town encourages Women and Minority-owned businesses to submit proposals.

## GENERAL SPECIFICATIONS

### 1. PREPARATION OF PROPOSALS

- A. Proposal procedure shall be in accordance with the provisions of Massachusetts General Laws Chapter 30B, 24 CFR Part 85 and all Massachusetts Community Development Block Grant Policies.
- B. The Price Proposal Form attached hereto shall be sealed and presented with, but not attached to, the proposal submitted.

### 2. INTERPRETATIONS

- A. No interpretation of the meaning of the SPECIFICATIONS will be made to any proposer orally. Every request for such interpretation shall be in writing addressed to Alice Boyd, Grant Administrator and to be given consideration, must be received no later than Monday October 30, 2017, five (5) calendar days (Saturday, Sunday and legal holidays excluded) prior to the date fixed for the opening of the proposals. Any and all such interpretations and any supplemental instructions will be in the form of written Addenda to the SPECIFICATIONS (at the respective addresses furnished for such purposes). Addenda shall be e-mailed to all registered bidders as necessitated.
- B. Failure of any proposer to receive any such Addenda shall not relieve such proposer from any obligation under his/ her proposal as submitted. All Addenda so issued shall become part of the SPECIFICATIONS. At the same time of the opening of the proposals, each proposer will be presumed to have read and to be thoroughly familiar with the SPECIFICATIONS (including all Addenda). The failure or omission of any proposer to examine any form, instrument, or document shall in no way relieve any proposer from any obligation with respect to his/her proposal.

### 3. SUBMISSION OF PROPOSALS

- A. The proposer shall submit one original hard copy of the non-price and price proposals and one electronic copy of the technical proposal only.
- B. The proposer shall submit the proposal with a letter of transmittal signed by an authorized official of the firm.
- C. Each proposal shall be submitted in a sealed envelope with the following marked on the outside: "Proposal for 2017 CDBG – Truro Regional Housing Rehabilitation Project." The proposal must be submitted in two individually sealed sections. One section shall contain the completed "Price Proposal Form," and shall be entitled, "Price Proposal." The second section shall contain the rest of the proposal including complete answers to all evaluation questions, and shall be entitled, "Technical

Proposal." All references to the proposal price shall be submitted on the form provided, with the proposal, but in a separate, sealed envelope marked "Price Proposal." No references to price shall be contained in the "Technical Proposal".

- D. If the proposal is mailed, the Proposer shall enclose his/her sealed proposal in an outer envelope and address it as follows:

To: Cassie Boyd Marsh, Grant Administrator  
9 Hillside Road  
Scituate, MA 02066-1020

All proposers are cautioned to allow ample time for transmittal of proposals. Proposals received after the specified times will not be accepted or recognized. Note that the times of receipt will determine the acceptability of mailed proposals regardless of postmark.

NOTE: The Town will not be held responsible for premature opening of proposal envelopes that are not properly filled out in accordance with the instruction set forth herein.

#### 4. WITHDRAWAL OR MODIFICATION OF PROPOSALS

- A. A proposal may be withdrawn by written request, providing that such request is received prior to time established herein for the opening of Proposals. The Town will not be responsible, however, for the timely receipt of any request for withdrawal in ample time for delivery before the proposal opening hour.
- B. Modifications to proposals may be submitted prior to the date and time specified for the receipt of proposals.
- C. One original copy of any modifications must be submitted together with a letter of transmittal signed by an authorized official of the firm.
- D. Modifications must be submitted in sealed envelopes clearly marked, "Proposal for 2017 CDBG – Housing Rehabilitation Project, Modification No. \_\_\_\_" (with each proposer's modifications numbered in sequence).
- E. Modifications must be clearly marked showing whether the modification is to the "Price Proposal" or to the "Technical Proposal."
- F. Modifications may only be comprised of replacement pages and/or insertion pages, together with an index of modifications.

## 5. EVALUATION OF PROPOSALS

- A. All proposals shall be received and evaluated in conformance with the requirements of MGL Chapter 30B, 24CFR Part 85 and all policies of the Massachusetts Community Development Block Grant Program.
- B. The Procurement Officer shall separate the "Technical Proposals" from the "Price Proposals." The price proposals will be opened at the specified time in the presence of one or more witnesses. The opening shall not be open to the public, and the contents of the proposals shall be kept confidential and not disclosed to competing proposers until after the evaluation process is completed.
- C. The Procurement Officer shall review each "Technical Proposal" to determine whether it meets the minimum requirements as set forth in the RFP. Failure of a proposal to meet a minimum requirement will disqualify a vendor's proposal from further consideration. The Procurement Officer shall state in writing his reasons for disqualifying any proposal.
- D. After evaluating the minimum requirement technical questions, remaining proposals shall be evaluated based solely on the comparative evaluation criteria specified in this RFP. Interviews may be held.
- E. In analyzing responses to the evaluative criteria, the Town shall consider the qualifications of proposers in the determination of the Successful Proposer, and make any investigations deemed relevant to the selection process. The minimum criteria shall be compliance with specifications and criteria set forth therein; attributes of goods or services proposed, investigations into qualifications, prior relevant experience, and past performance. The Town will confirm claims of past experience. The comparative evaluation criteria are set forth in the proposal specifications section of this document.
- F. The contract will be awarded to the most advantageous proposal as determined by the Town. The Town reserves the right, upon basis of such evaluations, to reject the Proposal of any and all Proposers who do not, in its estimation, pass under such evaluations, or to select a Proposer other than the apparent lowest cost proposer if the investigations indicate that such action is in the Town's best interest

## 6. RIGHT TO REJECT PROPOSALS

The Town reserves the right to reject any or all proposals if it deems it in the public interest to do so.

## 7. GENERAL CONTRACT INFORMATION

- A. The Town of Truro is exempt from paying any and all otherwise applicable state and federal sales taxes.
- B. The contract documents will include the Request for Proposals, General Specifications, Proposal Specifications and Proposal submitted.
- C. The Vendor is an independent contractor and is not an agent or employee of the Town of Truro and is not authorized to act on behalf of the Town.

## SPECIFICATIONS FOR SERVICES

### **Project Description**

The Town of Truro was recently funded to provide housing rehabilitation services in accordance with its FY 17 CDF application.

This RFP is for the implementation of a regional housing rehabilitation program. This project will be targeted toward rehabilitating units in the towns of Truro, Eastham, Harwich and Provincetown in the town-wide target areas as rental or ownership properties for LMI residents. The maximum funding for any one unit is \$40,000 and it is anticipated that 17 homes will be rehabilitated. There is a total of \$135,462 for Program Delivery inclusive of all costs and a total of \$605,811 for Rehab Loans. All project and financial files will be maintained digitally on a shared platform of the Grant Administrators' choosing for remote site desktop monitoring.

Proposals must include a Scope of Services addressing the administrative and programmatic requirements for operating a housing rehabilitation program. The Housing Rehabilitation Project will include:

#### 1) Marketing the Housing Rehabilitation Program

- a) Initiate a marketing effort to reach targeted neighborhoods and all LMI residents
- b) Reach out to applicants on existing waiting list
- c) Provide information and information sessions to residents interested in participating in a housing rehabilitation program
- d) Create a mechanism for accepting applications from residents in such a manner as to insure that there is no discrimination toward any resident and that all applicants are treated fairly and prioritized on a first-come/first-serve basis with the exception of bona fide emergency rehab needs.

## 2. Selecting Applicants for the Program

- a) Complete a full income qualification of each applicant and tenant, as required
- b) Complete work write-up of each applicants home, following state, federal and local regulations regarding the abatement of toxic materials and code compliance
- c) Complete an environmental review on each property, submitting it to the required authorities/agencies
- d) Analyze the homeowners' ability to provide matching funds

## 3. Solicitation of bids

- a) Create a list of licensed General Contractors for participation in the program, securing documentation of licenses, insurance, and references.
- b) Provide homeowners with a list of Contractors and insure that bids are collected for each project, as defined by a consistent detailed work write-up
- c) Review bids and assist homeowners in selecting contractor
- d) Prepare contract between contractor and homeowner

## 4. Completion of closing with each homeowner.

- a) Complete closing documents, including deed restrictions and loan documents
- b) Record all appropriate documents at the Registry of Deeds

## 5. Oversight of Construction.

- a) Have Licensed Construction Supervisor/Rehab Specialist review each project previous to making progress payments to contractor
- b) Secure copy of Building Permit and Certificate of Occupancy previous to final payment to contractor
- c) Secure all necessary sign-offs from homeowner and GC previous to closing out project

## 6. Assistance with Subsequent Years' Funding.

- a) Provide an updated wait list, pre-applications and necessary information to highlight need to continue the program.
- b) Provide letters of support to substantiate funding request.
- c) Provide documentation regarding program marketing.

All documents prepared for the project shall remain the property of the Town Truro subject to the specific requirements of the grant.

Selection shall be subject to additional discussions and/or negotiations based on proposals received. The successful applicant will be required to prove that they have the technological tools, staff and expertise to manage the paperless grant management system.

## MINIMUM EVALUATION CRITERIA AND TECHNICAL QUESTIONS

Each proposer shall indicate his/her agreement with each of the following questions. To merit further consideration of a proposal by the Town, proposer must indicate "yes" and comply, where appropriate, with each statement below:

1. Has the proposer conformed in all material respects to the submission requirements as set forth in the RFP?

\_\_\_\_\_ Yes \_\_\_\_\_ No

2. Does the proposer have a minimum of two years' experience with CDBG housing rehabilitation grants?

\_\_\_\_\_ Yes \_\_\_\_\_ No

3. Does the proposer have a minimum of three references for confirmation of quality performance standards?

\_\_\_\_\_ Yes \_\_\_\_\_ No

## COMPARATIVE EVALUATION CRITERIA

The following section contains an explanation of the comparative evaluation criteria that will be used in measuring the relative merits of each proposal that has met the Minimum Criteria established.

Highly Advantageous - Proposal excels on specific criterion.

Advantageous - Proposal fully meets the evaluation standard that has been specified.

Not Advantageous - Proposal does not fully meet the evaluation standard, is incomplete or unclear, or both.

Unacceptable - Proposal does not meet the specification criterion.

Following the individual ranking for each of the individual comparative criterion, proposals shall receive a composite rating corresponding to the above-listed scale.

Each proposal shall respond to the following statements/questions. If written on a separate sheet of paper, please repeat the question before indicating your answer.

## **1. EVALUATION OF SCOPE OF SERVICES**

The Town places a premium on the proposer's approach to the project and the ability to present a program of services that complies with the required scope of services in a manner that is clear, concise and complete with respect to required activities. Under the section of this RFP entitled, "Specifications for Services", proposers are required to submit a scope of services addressing the administrative requirements of the Town. This scope of services will be used in the evaluation of proposals.

The Town will find it unacceptable if a scope of services section is not included, or is included in an incomplete manner. Proposals that address required items, but only in general or vague terms that do not adequately represent tasks to be performed will be given the rating of not advantageous. Proposals which address all required items in an adequate manner but are unclear in some respects which leaves questions on the part of the Town as to key aspects of the manner in which tasks will be performed will be given the rating of advantageous. Proposals that excel in all respects in clearly and concisely addressing all required elements of the scope of services shall be given the rating of highly advantageous.

## **2. EXPERIENCE OF THE FIRM AND ITS MANAGEMENT**

The Town places a premium on the experience of the firm in providing Housing Rehabilitation Services for projects funded under the Massachusetts CDBG. In evaluating proposals, the Town will consider the experience of firm personnel in this area. Please describe your background and experience with CDBG grant implementation, and provide the resumes of all personnel to be directly assigned to this project along with the FTE's for each individual assigned to the project.

The Town shall find it unacceptable if project personnel possess less than two years of experience in CDBG grant program implementation; two years experience shall be given the rating of not advantageous; more than three but less than five years of experience shall be given the rating of advantageous; more than five years of experience shall be given the rating of highly advantageous.

## **3. AVAILABILITY TO MEET WITH TOWN REPRESENTATIVES**

The Town places a premium on its ability to have access to the Housing Rehabilitation Sub-grantee throughout the life of the project. Please describe your availability to meet or confer with the Town's Grant Administrator and/or Town Manager and Board of Selectmen. The Town shall find it unacceptable if the proposer is unable to meet with the Town's designated representative. Usual availability for less than five (5) business days per week shall be given the rating of not advantageous; usual availability for five (5) business days per week but during limited hours shall be given the rating of advantageous; usual availability for five (5) business days per week during normal business hours shall be given the rating of highly advantageous.

#### **4. CDBG HOUSING REHABILITATION PROGRAM CLIENTS**

The Town places a premium on the number of successful projects that the proposer has undertaken which are similar to the Town's current project. Please provide a list of clients for which you currently provide CDBG project implementation or housing rehabilitation services, or for which you have completed projects within the past five-year period. More than three clients who consider your services satisfactory or better shall be given the rating of highly advantageous; three clients who consider your services satisfactory or better shall be given the rating of advantageous; three or more clients not all of whom consider your services satisfactory or better shall be given the rating of not advantageous; having fewer than three clients who consider your services unsatisfactory shall be given the rating of unacceptable.

**CERTIFICATE OF NON-COLLUSION**

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

\_\_\_\_\_  
(Signature of individual submitting proposal)

\_\_\_\_\_  
(Name of Business)

**COMMONWEALTH OF MASSACHUSETTS**

County of \_\_\_\_\_ ss.

On this the \_\_\_\_\_ day of \_\_\_\_\_, 2017 before me,

\_\_\_\_\_, the undersigned Notary Public,  
Name of Notary Public

personally appeared \_\_\_\_\_,  
Name of Document Signer

proven to me through satisfactory evidence of identity, which was:

\_\_\_\_\_  
Description of Evidence of Identity

to be the person(s) whose name (es)  
was/were signed on the preceding or  
attached document in my presence.

\_\_\_\_\_  
Signature Notary Public

\_\_\_\_\_  
Printed Name of Notary

Place Notary Seal and/or any Stamp Above

My Commission Expires: \_\_\_\_\_

**TAX COMPLIANCE CERTIFICATE**

Pursuant to M.G.L. c. 62C, ss 49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.

\_\_\_\_\_  
*(Signature of individual submitting proposal)*

\_\_\_\_\_  
*(Name of Business)*

**COMMONWEALTH OF MASSACHUSETTS**

County of \_\_\_\_\_ ss.

On this the \_\_\_\_\_ day of \_\_\_\_\_, 2017 before me,

\_\_\_\_\_, the undersigned Notary Public,  
Name of Notary Public

personally appeared \_\_\_\_\_,  
Name of Document Signer

proven to me through satisfactory evidence of identity, which was:

\_\_\_\_\_  
Description of Evidence of Identity

to be the person(s) whose name (es)  
was/were signed on the preceding or  
attached document in my presence.

\_\_\_\_\_  
Signature Notary Public

\_\_\_\_\_  
Printed Name of Notary

Place Notary Seal and/or any Stamp Above

Expires: \_\_\_\_\_

My

Commission

# PRICE PROPOSAL FORM

**ATTENTION:** YOU MUST SUBMIT THE PRICE PORTION OF YOUR PROPOSAL SEPARATELY FROM THE TECHNICAL PROPOSAL TO AVOID DISQUALIFICATION FROM FURTHER CONSIDERATION

To the Town of Truro:

The undersigned proposes to operate the CDBG Housing Rehabilitation Program for the complete project at the contracted price specified below:

The proposed contract price is \_\_\_\_\_ Dollars.  
(\$ \_\_\_\_\_ )

The undersigned certifies under the penalties of perjury that this proposal has been submitted and made in good faith and without collusion or fraud with any other person. As used in this section, the word "person" shall mean any natural person, joint venture, partnership, corporation, or other business or legal entity.

Date \_\_\_\_\_

By \_\_\_\_\_

\_\_\_\_\_  
(Name/Title of person signing proposal)

\_\_\_\_\_  
(Company)

\_\_\_\_\_  
(Business Address)

\_\_\_\_\_  
(City, State, Zip Code)