



**LEGAL NOTICE  
CITY OF MEDFORD  
REQUEST FOR PROPOSAL  
RFP 24-0262**

**Consultant to Conduct a Feasibility Analysis and Develop a Strategic Plan for a Community Land Trust**

The City of Medford, led by the Office of Planning, Development, and Sustainability, is accepting proposals for consultants to conduct a feasibility analysis and develop a strategic plan for a Community Land Trust in the City of Medford. Bid Documents will be available online beginning at **1:00 PM on Thursday, March 28, 2024**, at <https://www.bidnetdirect.com/massachusetts/cityofmedford>. All Questions & Answers are due by **Wednesday, April 10, 2024, by 11:00 AM**. The Contract shall commence immediately upon signature of the contract and will end on May 30, 2025.

This project is being Electronically Bid (E-Bid). All proposals shall be submitted online to [www.BidNetDirect.com](http://www.BidNetDirect.com) prior to **Friday, April 19, 2024, by 11:00 AM**. Hard copy proposals will not be accepted by [BidNetDirect.com](http://www.BidNetDirect.com). You can register to become a bidder (for free) online at [www.BidNetDirect.com](http://www.BidNetDirect.com). For assistance, contact BidNetDirect.com at: 1-800-835-4603.

Proposers shall submit a technical, or non-price proposal which includes everything responsive to this RFP. This technical, or non-price should be clearly marked "**RFP 24-0262 Technical Proposal.**" The price proposal shall be submitted in a separate electronic file and should be clearly marked "**RFP 24-0262 Price Proposal.**"

Each Proposal shall be submitted in accordance with the Submission Requirements within the RFP and M.G.L. c. 30B, §6 shall apply to this project. It is the responsibility of prospective proposers to check [www.BidNetDirect.com](http://www.BidNetDirect.com) for new information via any addenda to this solicitation. Any addenda issued will be emailed to all plan holders registered with BidNetDirect.

The City of Medford reserves the right to accept any proposal, in whole or in part, to reject any/or all proposals and to waive minor irregularities and/or informalities as it deems to be in the best interest of the City. The city is an Equal Opportunity Employer and encourages MBE/WBE/DBE participation in response to the bid process.

**Fiona Maxwell  
Chief Procurement Officer**

## **DECISION TO USE COMPETITIVE SEALED PROPOSALS**

The Chief Procurement Officer has determined that in order to select the most advantageous proposal for consulting services support for the Feasibility Analysis and Strategic Plan for a Community Land Trust, comparative judgments of technical factors, in addition to price, will be necessary for the following reasons:

1. Upon review of the City's Comprehensive Plan and Housing Production Plan, the consulting company will help the City propose a Community Land Trust model that aligns with the City's planning goals and future development.
2. The City requires specific expertise and experience in conducting a feasibility analysis and developing a strategic plan for a Community Land Trust.

An evaluation committee comprising Office of Planning, Development and Sustainability Staff shall review, evaluate, and rate each proposer's technical information. After this rating has been reviewed and accepted, the City will open price proposals. The City may invite the top proposer for an interview/presentation before an award is made. The City will award the contract to the proposer it determines most advantageous based on the technical, price proposal and presentation/interview.

## **PURPOSE**

This Request for Proposal seeks proposals from qualified consultants to conduct a feasibility analysis and develop a strategic plan for a community land trust model of affordable housing acquisition and maintenance in Medford.

## **BACKGROUND**

In response to community engagement efforts that informed the City of Medford's Housing Production Plan, adopted in September 2022, Medford residents have proposed for the creation of a Community Land Trust (CLT) to enhance affordable housing options. One such interest came from West Medford residents. The City supports such private efforts and encourages independent community-based organizations to create affordable housing throughout Medford's neighborhoods. Supporting the development of affordable housing citywide is a key initiative to foster inclusivity and close the persistent racial wealth and homeownership gap.

## **FUNDING SOURCE**

The project will be funded by the Executive Office of Housing Livable Communities' Community Planning Grant Program

## **PROJECT GOALS**

The goals of this project include, but are not limited to the following:

1. Build the capacity of a local, grassroots housing group to effectively organize, manage, and sustain a CLT.
2. Determine the type of CLT model that is the most suitable in Medford (e.g., neighborhood-based/ city-wide / regional model)
3. Provide insights into the economic viability of a CLT under different conditions to inform decision-making and strategic planning.
4. Identify and assess prospective parcels suitable for disposal of both municipal and private land.
5. Ensure that zoning regulations are conducive to affordable housing initiatives and community land trust models.
6. Develop educational materials and organize public engagement.

## **SCOPE OF SERVICES**

The chosen consultant will ensure that the Feasibility Analysis and Strategic Plan are tailored to the needs of Medford residents and will work towards fulfilling the following services, which are outlined in no specific order:

### **1. Capacity Building and Partnerships:**

- With support from the City, establish a working group of policy officials, community leaders, members of housing advocacy groups, individuals with housing sector experience, and interested tenants.
- Identify potential partnerships and develop a collaborative structure with other organizations such as the City's Affordable Housing Trust Fund, Municipal Agencies, Community Development Corporations, and non-profit and private organizations that develop affordable housing through inclusionary zoning programs.
- Identify City of Medford's role in supporting a CLT.

### **2. CLT Model:**

- Conduct literature and case studies of various CLT models and determine the most suitable model that best addresses the local needs.
- Explore the possibility of partnering with existing CLTs in the region to establish a regional CLT consisting of operations across two or more cities.

### **3. Land Assessment:**

- Identify both municipally and privately owned parcels suitable for disposition to support a

CLT's goals of affordable housing development.

- Conduct a thorough assessment of potential sites based on criteria such as location, size, accessibility, and zoning regulations.
- Identify methods of land acquisition that would be most suitable for a CLT in Medford.

#### 4. Zoning Ordinance Review:

- Review existing zoning ordinances and propose revisions, if necessary, to align with and support the development of identified parcels under a CLT model.
- Assess the feasibility and efficacy of implementing an overlay district to specifically support CLT development goals. Explore how such a district could streamline regulatory processes and incentivize affordable housing projects within the community.

#### 5. Policy and Financial Framework:

- Draft a mission statement that could guide a CLT forward and include a range of possible directions a CLT may take in the future.
- Conduct a comprehensive financial analysis considering various scenarios, including best case, worst case, and base case, while accounting for factors such as density, regulatory constraints, and other variables.
- Develop a sustainable financial model, identifying potential funding sources to cover operations, acquisitions, and maintenance of a CLT.
- Review examples of Community Land Trust Bylaws and draft a Bylaw template that would be optimal for a CLT in Medford.

#### 6. Strategic Planning:

- Outline specific goals, timelines, and milestones for the establishment and growth of a CLT.
- Develop an actionable strategic plan for the first five years of operation, outlining the critical tasks needed to begin operations as an affordable housing organization and assessing optimal organizational capacity.
- Ensure that the strategic plan supports Medford's Housing Production Plan and Comprehensive Plan.

#### 7. Public Engagement and Educational Materials Development:

- Organize public engagements to solicit input and feedback from key stakeholders, including housing advocacy groups, affordable housing, developers, community residents, and City officials.
- Develop training and guidance resources to empower a CLT in establishing and maintaining a successful Trust.
- Develop a communication strategy to raise public awareness about a CLT initiative.
- Create and distribute educational materials tailored for prospective CLT homeowners, developers, community residents, and City officials.
- Ensure that these materials are accessible, informative, and help build a shared understanding

of a CLT concept and its benefits.

## PROJECT PROCESS AND TIMELINE

### 1. Anticipated Project Timeline

- a. Submittal Closing Date.....April 19, 2024
- b. Selection.....May 2024
- c. Completion of Contract Negotiation .....May 2024
- d. Approval of Contract/ Planning Study Begins.....June 2024
- e. Completion of Final Report and Presentation.....May 2025

## MINIMUM AND COMPARATIVE PROPOSAL CRITERIA

### 1. Minimum Criteria

This RFP requires a separate and confidential submission of a Price Proposal and separate submission of a Technical Proposal. Technical Proposals will be evaluated by the review committee members. Review committee composed of Office of Planning, Development and Sustainability Staff.

The proposal evaluation and selection process will be (1) proposal evaluations of both technical and Price, (2) interviews if warranted, and (3) recommendations.

The committee will review each proposal to ascertain whether a proposer has met the RFP's Minimum Criteria. The Minimum Criteria shall consist of providing responses to all of the items requested in this RFP. A contractor may be deemed unacceptable if the following Minimum Criteria are not met:

- A. Project Approach:** Describe the proposed approach to the project and a statement of project understanding, including an overview of the methodology and an acknowledgement and detailed plan encompassing the Scope of Services detailed above.
- B. Project Schedule:** Each consultant must submit a project schedule, including proposed dates for project milestones (e.g., meetings, products, etc.) assuming a contract target start date of June 2024.
- C. Project Deliverables:** Each consultant must submit a list of expected deliverables or other documents that the team will generate for the project, including but not limited to drafts and final document of feasibility analysis and strategic plan, setting up of a CLT working group, and organizing public engagements. The consultant must also provide a project timeline necessary to satisfy the scope of services and quarterly report on their work updates.
- D. Project Team:** Identify key staff and their experience working with Community Land Trust and providing similar Technical Assistance. The scope of work may be completed by more

than one entity if it is applicable, deemed cost efficient and in the best interests of the City to do so. Indicate staff's availability to undertake this project beginning on or about June 1, 2024.

The project team combined shall have the following:

1. Member/s with a Master's degree in Planning, Economic Development, Community Development or a closely related field;
2. Member/s with five years of professional experience working with Community Land Trust;
3. Member/s with experience conducting feasibility studies and writing strategic plans related to Planning and Community Land Trust.

Resumes are required for all project personnel including those listed above.

The proposer shall clearly identify sub-consultants, if any, and describe the contractual arrangements that will exist with all consultants. The proposal submitting Consultant will be considered the prime contractor and will be fully responsible for the performance of any task pursuant to this contract, including the quality and timeliness of work performed by any consultant.

**E. Previous Work:** The proposal should contain details of similar work previously completed by the consultant(s).

**F. References:** The proposal should contain the contact information of at least three (3) references for whom the consultant has previously performed work.

In addition, proposers shall provide with their Technical Proposals the following completed documents:

1. Bidder's Qualifications and References Form
2. Non-Collusion Form
3. Certificate of Corporate Authority (if applicable)
4. Debarment Letter
5. IRS W-9 Form

## **2. Comparative Criteria**

The evaluation of each proposal for Services will be based upon the four (4) "Comparative Criteria" described in this section. Proposals which meet or exceed the Minimum Criteria will be evaluated and rated based on the following Comparative Criteria. The City reserves the right to ask any proposer to provide additional supporting documentation in order to verify a response.

Ratings of Highly Advantageous (HA); Advantageous (A); Not Advantageous (NA); or Unacceptable (U) will be given to each of the following criteria for each proposer. A composite rating will then be

determined. A composite rating of Highly Advantageous or Advantageous may be assigned only if a proposal has received at least one such rating among the criteria listed below.

To the extent that an Evaluation Criterion requires the certification of fact, the proposer's certification as to that fact shall be an adequate response provided, however, that on request the proposer shall provide to the City such evidence as the City may request to support that fact.

Comparative Criteria are listed in order of priority:

**A. Quality and Depth of Project Experience:**

Include with your statement of qualifications samples of at least one similar community land trust project the consultant has successfully completed. The sample(s) should be no more than a few pages.

**Highly advantageous:** The statement of qualifications demonstrates superior experience in providing services related to the City's requirements. The project proposal demonstrates a wide depth of experience with similar projects (4 or more), and prior experience with municipal contracts.

**Advantageous:** The statement of qualifications demonstrates solid experience in providing services related to the City's requirements. The project proposal demonstrates a good depth of experience with similar projects (1 to 3), and prior experience with municipal contracts.

**Not Advantageous:** The Proposer has limited to no experience in providing services related to the City's requirements or with similar projects, and prior experience with municipal contracts.

**Unresponsive:** The Proposer has not provided any examples of previous related work.

**B. Technical Approach:**

**Highly advantageous:** The project proposal demonstrates a comprehensive understanding of the Scope of Services and thorough attention to detail. The proposal highly aligns with Medford's planning context and affordable housing needs.

**Advantageous:** The project proposal demonstrates a moderate understanding of the Scope of Services and modest attention to detail. The proposal moderately aligns with Medford's planning context and affordable housing needs.

**Not advantageous:** The project proposal lacks comprehensive understanding of the Scope of Services and thorough attention to detail. The proposal does not align with Medford's planning context and affordable housing needs.

**Unresponsive:** The proposer does not provide information regarding their Technical Approach.

### **C. Qualifications of the Proposer**

**Highly advantageous:** The proposer's resume(s) demonstrate that the proposer has superior training, educational background and work experience appropriate to the project described herein, and all key project personnel demonstrate professional experience well beyond the minimum requirements.

**Advantageous:** The proposer's resume(s) demonstrate that the proposer has adequate training, educational background and work experience appropriate to the project described herein, and all key project personnel demonstrate professional experience that meets or somewhat exceeds the minimum requirements.

**Not Advantageous:** The proposer's resume(s) do not demonstrate that the proposer has adequate training, educational background and work experience appropriate to the project described herein.

**Unresponsive:** The proposer did not provide any resumes or background information for project personnel.

### **D. References**

One member of the Evaluation Committee will check three (3) references of all Consultant teams who meet the minimum criteria asking the same questions of each reference. The person who checks the references will prepare a report for the remaining evaluators.

**Highly advantageous:** All references contacted spoke favorably of the work performed by the proposer and would use them again for a similar project without hesitation.

**Advantageous:** The great majority of references spoke favorably of the work performed by the proposer and would use them again for a similar project without hesitation.

**Not Advantageous:** One reference stated that there had been significant difficulties with the proposer's ability to deliver the contracted services and deliverables.

**Unresponsive:** Proposal lacks references.



## **PRICE PROPOSAL**

Proposers shall use “**ATTACHMENT A**” to this **RFP #24-0262** in submitting its Price Proposal. Please remember to submit your Price Proposal in a separately sealed marked envelope. Any Technical Proposal with prices included will be deemed unresponsive. Price Proposals will be opened only after evaluation of all Technical Proposals is complete. Project fees shall reflect the hourly rate for services to be provided.

## **SUBMISSION INFORMATION**

Proposals will be received until: **April 19, 2024, by 11:00 AM** via <https://www.bidnetdirect.com/massachusetts/cityofmedford>

The award will be made to the most advantageous proposer for consulting services based on the recommendation of the Evaluating Committee.

The term of the contract is for 11 months.

All proposals are subject to the provisions of M.G.L. c.30B, §6.

The City can reject any and all bids in accordance with the above referenced General Laws. In addition, the City reserves the right to waive minor informalities in any or all bids, or to reject any or all bids (in whole or in part) if it is in the public interest to do so.