

**TOWN OF BOXFORD, MASSACHUSETTS**  
**SOLICITATION**

*Architectural Design For An Affordable, Accessible  
Senior Dwelling*

*Q&A Session: November 9, 2022*

*RFP Due Date: November 14, 2022*

*Award Date: November 28, 2022*

Office of the Selectmen  
Boxford Town Hall  
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## I. REQUEST FOR SERVICES

The Town of Boxford (the Town) is seeking proposals from professional architectural firms to facilitate a public participation process to envision various forms and designs of senior housing on a site owned by the Town of Boxford.

The process should consider a variety of design options based on input and feedback from town boards, Town residents, the Historic District Committee, and the Council on Aging consistent with the objective of affordability and accessibility. This will lay the groundwork for warrant articles before a future Town Meeting to make the land available for a senior housing development and allow the Voters to make more informed decisions. The results of the process will also serve as a guide to the town in its writing of an RFP for development that will set forth town preferences in design of the development at some future time. Another purpose for the proposed work of the firm is to provide sufficient cost information so the town can determine if the contemplated development can be financially feasible within the constraints of the site and affordability. This determination will be made by a housing consultant that the Boxford Housing Partnership committee (BHP) will provide under a separate contract.

The selected firm will work closely with the Boxford Housing Partnership (BHP) committee throughout the process. The selected firm is expected to draw on their experience in designing housing for senior citizens and managing public meetings so that the interaction with the community will be a meaningful one and will yield a representation of what is both feasible and desired by the community.

The task shall include, but not be limited to:

- A site visit to understand the topography and relationship to surrounding area
- Meetings with the Boxford Housing Partnership, as required
- Meetings with the Boxford Historic District Committee, as required
- Community engagement meetings
- Design options and work products resulting from the above process to share with community that will include:
  - Optimum number of units per building in a manner consistent with the topography
  - Floor Plans of entire building
  - Elevations
  - Proposed Structural system
  - Outline specifications with proposed materials
  - Code Study
  - Mechanical/ Electrical / Plumbing narrative
  - One (1) Rendering
  - Financial trade-offs of construction of various configurations
  - Preliminary cost estimate of construction, material and labor

A site plan will not be required because detail information from a previous site survey will be provided at the first meeting. Concurrent with the design process will be a financial review to ensure that the final configuration will be consistent with units that could be rented or sold at affordable rates. The design costs shall be restricted to the construction costs of the unit itself and not the site preparation, septic or water since they were addressed in a previous study. The architect will be expected to coordinate with a housing consultant that the Town will provide as the schedule indicates. A maximum budget of **\$32,000** has been appropriated and approved for this contract.

## II. PROJECT BACKGROUND AND DESCRIPTION

In 2007, the Town of Boxford purchased a 75-acre lot with CPA funds for the following purposes: active recreation, passive recreation and community housing. A 13.4-acre portion of this purchase was identified for community housing. This parcel (known as use area 3) has been perked, conservation setbacks established and a buildable area identified as restricted area H. (See a more detailed discussion in Figure 1.) The only option for a multi-unit development within Boxford regulations would be to rezone the parcel as an Elderly Housing District (EHD), the requirements of which are summarized in Table 1. As noted in Figure 1, this would result in a reduction of the buildable area. The only other option would be to develop this parcel with a comprehensive permit under 40B to employ the entire restricted area H. However, the total number of units would still be limited to 12 units per Boxford Board of Health regulations and 40B would impose further restrictions on the development.

The engagement will be in two phases (as shown in the schedule), with the architect working closely with the Boxford Housing Partnership Committee, as well as Boxford Historic District Committee and other Town boards, to discuss and review preliminary design options and construction costs for a proof of concept. The general parameters for the housing units are shown in Table 2. This information from this study will be shared with the BHP's housing consultant to determine financial feasibility of the development. If a development is deemed feasible based on the Phase One work, the architect and the BHP will move to the second phase with community input meetings with the Council on Aging and Boxford residents. The community meetings are intended to test and refine the design options with input from the public and potential residents, as well as to educate voters in preparation for a future Town Meeting vote on development of the parcel.

## III. SCOPE OF SERVICES

The Architectural Consultant shall be responsible for completing the tasks listed in the schedule of Section IV consistent with the general parameters for the housing units listed in Table 2 and providing the following services for presentation to the Town in informal meetings held by the Boxford Housing Partnership as required by the schedule below. The program is divided into two phases. Phase 1 will establish the proof of concept of the development. It is recognized that a small development such as this will have its challenges, especially considering the current cost of construction. Cost drivers will be examined, such as size of the units, number of units per building, proposed materials as required by the Historic District Committee (HDC), proposed HVAC, etc. Environmental considerations will be included. The proof of concept will include a preliminary financial review from a housing consultant the BHP shall provide. If it is determined that the project is not financially viable, the town reserves the right to terminate the contract for hours spent to date.

Based upon successful completion of Phase 1 that demonstrates a financially viable concept, Phase 2 will be authorized to continue. Here, the remainder of the requested services will be presented as described in the schedule below including a final financial review. Based upon input from Town boards and the general public, it is anticipated that minor modifications may be made to the design. Those modifications will be made and the contract will be completed by June 15, 2023.

Modifications to the tasks and schedules must be made in writing and agreed to by the Town. The selected Proposer will be required to sign a contract with the Town of Boxford in which he/she accepts responsibility for the performance of services as stated in this solicitation and be prepared to commence work immediately upon execution of the signed contract. No goods or services are anticipated to be purchased in this contract.

IV. SCHEDULE

The deadline for submittal of proposals is November 14, 2022 and contract award will be November 28, 2022. The program schedule below is provided as a guide to tasks and the expectations of the Housing Partnership. As indicated in the schedule, submission of a data package may be substituted for a meeting (virtual or in person) based upon mutual agreement. A point of contact in the Housing Partnership will be designated during the design to facilitate communication. The Proposer is invited to modify this schedule and number of meetings as necessary and include it in the response to this Solicitation, however no submission will be accepted that includes a final completion date later than June 15, 2023.

| <b>Milestones</b>                       | <b>Activities</b>   | <b>Completion<sup>1</sup></b>                         |
|---|---|---|
| Contract Award                          |   | November 28, 2022                                     |
| <b>PHASE 1 START</b>                    |   |   |
| Project Review<br>Site Visit            | Public meeting with BHP, civil engineer and architect. In person site walk and review, time TBD between 10 AM and 3PM   | Week of 12/5/22                                       |
| Project Review                          | Public meetings and/or submitted reports between BHP, Historic District Committee, civil engineer, architect and housing consultant as required.  | 3 Meetings, as required, between 12/19/22 and 2/13/23 |
| Proof of concept.<br>End of Phase 1     | Public meeting with BHP, housing consultant and architect. Floor plans and preliminary housing cost estimate. Estimate housing subsidy. Select the unit configuration, number of units per building, etc. Public comment will be accepted at the end of meeting | Week of 2/27/23                                       |
| <b>PHASE 2 START</b>                    |   |   |
| Review design                           | Public meeting between BHP and architect to review selected design with input from housing consultant. Public comment will be accepted at the end of meeting  | Week of 3/20/23                                       |
| Drawings submittal to BHP               | Architect to submit iteration #1 with updated design reflecting any cost improvement. Initial deliverables  | Week of 4/3/23  |
| Housing report                          | Housing consultant to deliver final report and recommendations  | Week of 4/10/23                                       |
| Community engagement:<br>first meeting  | Meeting to solicit public input. Review public input with architect for iteration #2 of design as required  | Week of 4/24/23                                       |
| Community engagement:<br>second meeting | Meeting to solicit public input with minor corrections to design as required  | Week of 5/15/23                                       |
| Final iteration of design               | Submit final design and report to BHP   | Week of 6/5/23  |
|   |   |   |
| Final deliverables                      | Final review of documents   | 6/15/23   |

Note: 1. The actual date will be dependent upon the schedule of relevant committees

## V. DELIVERABLES

Please see Scope of Services for additional details. It is intended that these documents be the property of the town for future use, either in this development or another. In fact, since this is funded by CPA funds (combination of State and Town), they may be public property. Release of information to third parties will be by written direction of the Town.

- Floor Plans of entire building
- Elevations
- Proposed Structural system
- Outline specifications with proposed materials
- Code Study
- Mechanical/ Electrical / Plumbing narrative
- Recommendations for energy efficiency and environmental considerations
- One (1) rendering
- Financial trade-offs of construction of various configurations
- Preliminary estimate of construction, material and labor
- Final report showing trade-offs and justification for final design

## VI. PROPOSAL SUBMISSION AND SELECTION PROCEDURE

Questions can be submitted by email to Brendan Sweeney at [bsweeney@boxfordma.gov](mailto:bsweeney@boxfordma.gov) and a response will be sent to all applicants in advance of the Q&A meeting. A Q&A virtual public meeting will be held on November 9, 2022 at a time to be determined. At that time, all questions to date will be reviewed. Everyone is invited to attend, if they feel the need for further clarification. Proposals and bids shall be submitted in a sealed envelope at the Town Administrator's office by 4:00 PM on Monday November 14, 2022. In person interviews of a few applicants may be held between Wednesday November 16, 2022 and Tuesday November 22 at a time mutually convenient. Announcement will be made by no later than 12 noon on Monday November 28, 2022.

The selection will be made on two sets of criteria (minimum and evaluation) and recorded on the Evaluation Grid of Table 3. The Minimum Proposal Submission Requirements (section VII) requires full compliance. The Proposal Evaluation Information (section VIII) is a scaling system of 4 levels from Unacceptable to Highly Advantageous. In addition, some line items are weighted differently to indicate the importance of that item. However, the applicant will be disqualified if any category is listed as Unacceptable (i.e., a "0").

## VII. MINIMUM PROPOSAL SUBMISSION REQUIREMENTS

Any contractor failing to provide all of the following submission requirements will be considered "notresponsive" and their proposal may be rejected without further consideration.

1. A letter signed by an officer of the firm, binding the firm to all comments made in the proposal is required. The letter must be signed as follow: 1) if the Proposer is an individual, by her/him

personally; 2) if the Proposer is a partnership, by the name of the partnership, followed by the signature of each general partner; and 3) if the Proposer is a corporation, by the authorized officer, whose signature must be attested to by the Clerk/Secretary of the corporation and the corporate seal affixed.

2. Firm/Individual History including length of time the firm/individual has been in business, legal form (sole proprietorship, partnership, corporation and State of incorporation), number and location of offices, number of employees, and other pertinent data. Please describe any parent/subsidiary/affiliate relationships.
3. Names and Titles of firm partners and/or officers that will be servicing the Town of Boxford. Submit the name and telephone number of the person who will be the main contact from the firm for this contract.
4. List of people expected to work on the contract, including names, education, professional licenses, registrations or certifications, relevant experience (see below), and role in the contract (resumes are acceptable). Any subcontractors to be included on the consulting team should be included in this list and identified as such. The Lead Consultant and any Project Managers should be clearly identified. The Consultant team must include on staff a Massachusetts Licensed Architect who, if applicable, can certify that the investigation was conducted in accordance with generally accepted architectural practices, and this person must be clearly identified in the proposal.
5. Resumes of all management personnel who will be assigned to this account. Describe what each individual's role will be and what services they will perform.
6. Indicate whether or not your firm has been dismissed or disqualified from a bid/contract within the past five years, and if yes, the reason(s) why.
7. The approach to be taken toward completion of the project, and an explanation of any proposed variations to the Scope of Work.
8. A description of relevant projects that the Proposer has worked on with client contact information, including contact names, addresses, and phone numbers. Staff who worked on these projects should be the same staff as proposed for the Town of Boxford contract.
9. List of resources, personnel, data, or other assistance that the Proposer expects or requires from the Town of Boxford in order to complete each task.
10. List of any action taken within the past five (5) years by any regulatory agency or litigation involving the firm or its agents or employees with respect to work performed. Consultants should explain if/why they are/are not at fault in these cases, why positive resolution of litigation is expected, and how they have taken steps to avoid repetition of these actions/litigations.
11. Provide a minimum of 3 references from municipalities (preferably from Massachusetts) of similar size.
12. Acknowledgement or modification of Project Schedule in Section IV.

13. Disclose any conditions (e.g., bankruptcy or other financial problems, pending litigation, planned office closures, impending merger) that may affect your organizations' ability to perform contractually.
14. Acknowledgment of Addenda: each proposer shall acknowledge the receipt of any addenda by signing and including it with their proposal.

#### VIII. PROPOSAL EVALUATION INFORMATION

Each of the 4 levels is given a value from 4 (Highly Advantageous) to 0 (Unacceptable) and these will be entered into the Evaluation Grid of Table 3. Note that some of the criteria are weighted differently. Please also note that if any one evaluation is listed as "Unacceptable", then the applicant will be disqualified.

##### Experience in designing affordable Senior Housing

*Highly Advantageous:* Design of three or more projects similar to the one to be undertaken by the Town of Boxford.

*Advantageous:* Design of two projects similar to the one to be undertaken by the Town of Boxford.

*Not Advantageous:* Experience with design of only one project similar to the one to be undertaken by the Town of Boxford.

*Unacceptable:* No experience in design of projects similar to the one to be undertaken by the Town of Boxford.

##### Experience in preparing and executing community engagement to engage local residents, and officials in an exchange of design ideas for senior housing

*Highly Advantageous:* Three or more projects preparing and executing an outreach campaign similar to the one to be undertaken by the Town of Boxford.

*Advantageous:* Two projects preparing and executing an outreach campaign similar to the one to be undertaken by the Town of Boxford.

*Not Advantageous:* Experience with only one project involving the preparation and execution of an outreach campaign similar to the one to be undertaken by the Town of Boxford.

*Unacceptable:* No experience preparing or executing an outreach campaign.

##### Experience in preparing conceptual plans (drawings).

*Highly Advantageous:* Three or more projects preparing conceptual plans similar to those to be undertaken by the Town of Boxford.

*Advantageous:* Two or more projects preparing conceptual plans similar to those to be undertaken by the Town of Boxford.

*Not Advantageous:* One project preparing conceptual plans similar to those to be undertaken by the Town of Boxford.

*Unacceptable:* No experience preparing conceptual plans similar to those to be undertaken by the Town of Boxford.

##### Demonstrated ability to complete project in a timely manner.

*Highly Advantageous:* The proposal includes a progress schedule which clearly indicates each task to be performed, the responsible person for completing that task, and commencement and completion dates.

*Advantageous:* The proposal includes a generalized progress schedule that demonstrates that the Proposer is able complete the Scope of Work by the completion date set forth in this RFP.

*Not Advantageous:* The Proposal includes a written progress schedule.

*Unacceptable:* The Proposal includes no progress schedule.

#### Availability for Meetings

*Highly Advantageous:* The Proposer is available and committed to attend as many public meetings deemed necessary by the Boxford Housing Partnership to complete the Scope of Work.

*Advantageous:* The Proposer has identified performance objectives effectively capping the number of meetings included in the Proposer's submission. Numerical limits may be included as guidelines

*Not Advantageous:* The Proposer places a definitive, numerical limit to the number of meetings included in the Proposer's submission.

*Unacceptable:* The Proposer does not clearly describe how many meetings will be attended by the Lead Consultant and the Consultant Team.

#### Key Personnel is On-Staff

*Highly Advantageous:* The Lead Consultant is a Licensed Architect and a Principal, Partner or Senior Executive of the organization.

*Advantageous:* The Lead Consultant is a Licensed Architect on-staff at the proposer's planning/architectural organization.

*Not Advantageous:* The Lead Consultant is a Licensed Architect not on staff of the proposer's professional planning/architectural organization.

*Unacceptable:* The Lead Consultant is not a licensed architect.

#### Qualifications of Licensed Architect

*Highly Advantageous:* The Licensed Architect has six or more years of hands-on experience.

*Advantageous:* The Licensed Architect has at least three years but not more than six years of hands-on experience.

*Not Advantageous:* The Licensed Architect has two years of hands-on experience.

*Unacceptable:* The Licensed Architect has less than two years of hands-on experience.

#### References from clients for similar projects

*Highly Advantageous:* At least three positive references from clients for similar projects.

*Advantageous:* At least two positive references from clients for similar projects.

*Not Advantageous:* At least one positive reference from a client for a similar project.

*Unacceptable:* No positive references from any client for a similar project.

# APPENDICES

## FIGURE 1

### MAP OF BOXFORD COMMONS SHOWING BUILDABLE AREA IN USE AREA 3 (COMMUNITY HOUSING)

Use area 3, a 13.4-acre parcel, is one of the 3 parcels that comprise the 75 acre Boxford Commons (Figure 2). Use area 3 is composed of restricted areas D, E and H. Restricted areas E and D are conservation areas and housing is not permitted. Housing will be permitted in restricted area H. If it is decided to rezone use area 3 as an Elderly Housing District per Boxford regulations, then the buildable area is further restricted by a 100-foot set back to property lines (per 196-24F3), resulting in the hatched area within area H. The arrow indicates the access to Middleton Road. Use area 2 is a multi-use ball field with deeded access across use area 3. Please note that use area 2 is restricted for recreation only and is NOT available for housing.

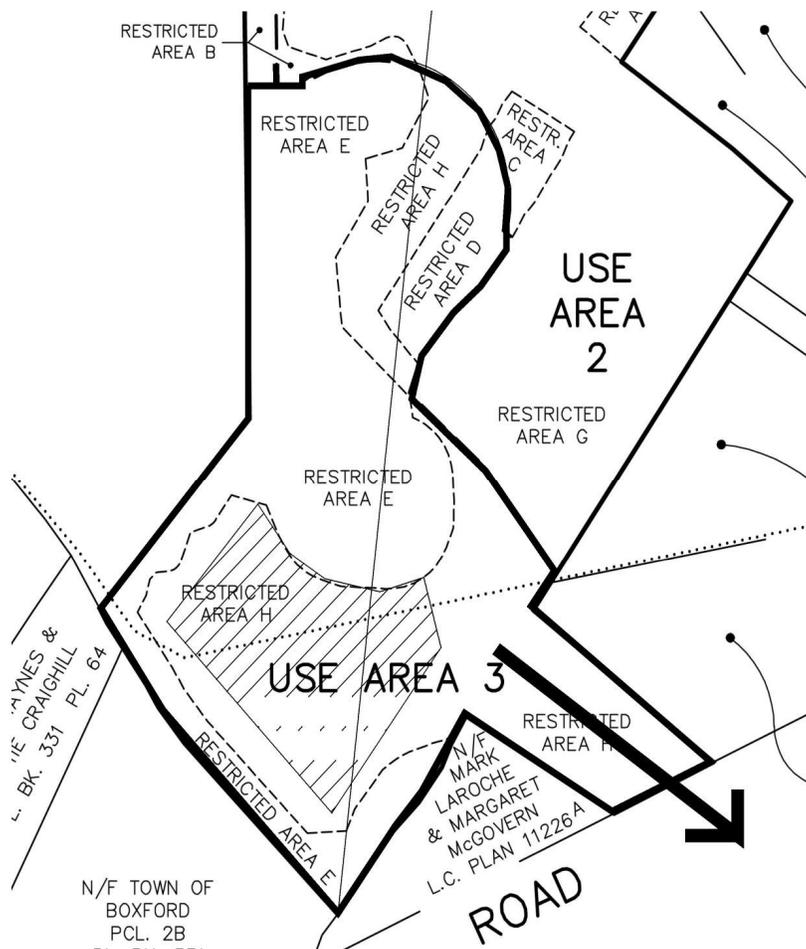
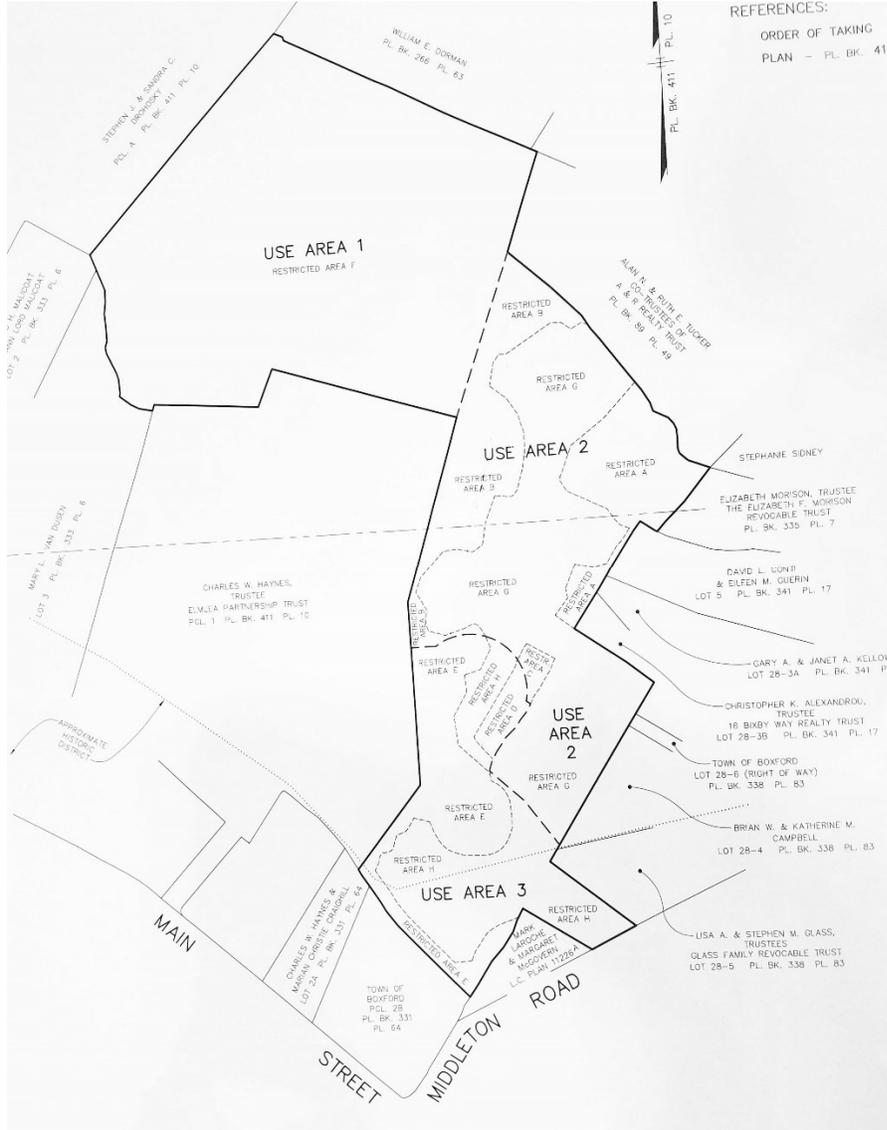


FIGURE 2

**BOXFORD COMMONS  
USE AREAS 1, 2 AND 3**



**TABLE 1**

**SUMMARY OF ELDERLY HOUSING DISTRICT  
REQUIREMENTS FROM BOXFORD ZONING REGS 196  
AS OF 2018**

|            | <b>CHAPTER</b> |               | <b>DESCRIPTION</b>                                    |
|------------|----------------|---------------|---|
| <b>196</b> | -              | <b>2</b>      | Zoning Map  |
| <b>196</b> | -              | <b>12</b>     | No senior housing in flood district                   |
| <b>196</b> | -              | <b>20</b>     | Definition and uses of elderly housing district       |
| <b>196</b> | -              | <b>35</b>     | # Of units/building is between 2 to 10                |
| <b>196</b> | -              | <b>35</b>     | Definition: Age restriction at least 55 yrs. or older |
| <b>196</b> | -              | <b>17C</b>    | Conservation district used in 196-24                  |
| <b>196</b> | -              | <b>20A1</b>   | Managed by a for-profit or non-profit organization    |
| <b>196</b> | -              | <b>20A(2)</b> | Any uses allowed in R-A are allowed in EHD            |
| <b>196</b> | -              | <b>20B</b>    | Use of accessory buildings allowed                    |
| <b>196</b> | -              | <b>23A</b>    | Building Height = Maximum of 35'                      |
| <b>196</b> | -              | <b>24B4</b>   | Minimum size of a lot in the district = 24 acres      |
| <b>196</b> | -              | <b>24B5</b>   | Maximum no of units in district = 104                 |
| <b>196</b> | -              | <b>24B6</b>   | Density of buildings = 1 per 2 acres                  |
| <b>196</b> | -              | <b>24D1a</b>  | Min lot frontage = 100 feet                           |
| <b>196</b> |                | <b>24D2b</b>  | Min lot width = 100 feet                              |
| <b>196</b> |                | <b>24D2c</b>  | Min lot depth = 50 ft                                 |
| <b>196</b> | -              | <b>24E3</b>   | Min distance to front lot line = 200 ft               |
| <b>196</b> | -              | <b>24F3</b>   | Min distance to side lot line = 100 ft                |
| <b>196</b> | -              | <b>26A8</b>   | Min number of parking = 4 per 3 living units          |
| <b>196</b> | -              | <b>30A</b>    | Site plan required                                    |
| <b>196</b> | -              | <b>32B</b>    | Phased growth not required                            |

## TABLE 2

### GENERAL PARAMETERS FOR HOUSING UNITS

These parameters are intended to be a starting point for the design and they will be reviewed with the architect at the first meeting. Input, suggestions and modifications to meet program objectives will be welcome.

#### GENERAL CONSIDERATIONS

Exterior material to be in keeping with Boxford and consistent with Boxford Historical District requirements.  
Forced hot air heating and cooking: consider tradeoff between gas fired, electric and 2 stage heat pump consistent with an affordable unit and environmental issues.  
Independent heat and air conditioning for each unit  
Common on-demand hot water for each building  
Energy efficient construction as per Mass State building codes  
HVAC, boiler, electric panel and plumbing access from garage side, where ever possible  
The Committee is open to suggestions to reduce construction costs, such as prefab construction.

#### UNITS

Units must be single level and wheel chair accessible  
Determine the optimum number of units per building with 2 being the minimum by EHD requirements  
Consider unit size 800 to 900 square feet for a 2-bedroom unit  
Doorways, main bedroom and bathroom to be accessible.  
Consider two bedrooms per unit with one full bath  
Consider a covered, private porch for each unit, 120 sq. ft. min, not enclosed  
Slab construction, insulated and vapor barrier (no cellar)  
Flooring recommendation: TBD, consistent with slab construction

#### GARAGE

If detached garage, employ a covered breeze way  
Consider a carport  
Garage size TBD  
Parking for 1 car for each unit  
Wheel chair accessible  
Consider secure storage for each unit in garage

#### COST

Based upon typical current costs for foundation, construction and finishing, estimate the typical range of construction cost, including material and labor, per building. The goal is that the units be available to residents at 100% of the AMI in Lawrence in accordance with CPA guidelines.

**TABLE 3**

**1. EVALUATION GRID**

|    | <b>EVALUATION CRITERIA per IX</b>                     | <b>WEIGHT</b> | <b>RESPONDER #1</b> | <b>RESPONDER #2</b> | <b>RESPONDER #3</b> |
|----|---|---------------|---------------------|---------------------|---------------------|
| 1  | Experience in Designing Affordable Senior Housing     | 2             |                     |                     |                     |
| 2  | Experience in Community Engagement                    | 1             |                     |                     |                     |
| 3  | Experience in Preparing Conceptual Plans              | 1             |                     |                     |                     |
| 4  | Demonstrated Ability To Complete in Timely Manner     | 1             |                     |                     |                     |
| 5  | Availability for Meetings                             | 1             |                     |                     |                     |
| 6  | Key Personnel is On-Staff                             | 1             |                     |                     |                     |
| 7  | Qualifications of Licensed Architect                  | 1             |                     |                     |                     |
| 8  | References from Clients for Similar Projects          | 1             |                     |                     |                     |
| 9  | Bid Amount  | 2             |                     |                     |                     |
|    |   |               | 0                   | 0                   | 0                   |
|    | <b>Total</b>  |               | <b>0</b>            | <b>0</b>            | <b>0</b>            |
|    | <b>MINIMUM REQUIREMENTS per VII</b>                   |               | <b>RESPONDER #1</b> | <b>RESPONDER #2</b> | <b>RESPONDER #3</b> |
| 1  | Binding letter signed by officers                     |               |                     |                     |                     |
| 2  | Firm history  |               |                     |                     |                     |
| 3  | Name & title of firm partners servicing the Town      |               |                     |                     |                     |
| 4  | List of people working on contract & subcontractors   |               |                     |                     |                     |
| 5  | Resumes of assigned personnel                         |               |                     |                     |                     |
| 6  | Has your firm been disqualified from a bid in 5 years |               |                     |                     |                     |
| 7  | Approach method and any variations                    |               |                     |                     |                     |
| 8  | Description of relevant projects                      |               |                     |                     |                     |
| 9  | List of resources required from the Town              |               |                     |                     |                     |
| 10 | List of litigation in the last 5 years                |               |                     |                     |                     |
| 11 | Three references                                      |               |                     |                     |                     |
| 12 | Project schedule acceptance                           |               |                     |                     |                     |
| 13 | Conditions that may impact performance (legal, etc.)  |               |                     |                     |                     |
| 14 | Acknowledge of the agenda                             |               |                     |                     |                     |
|    |   |               | 0                   | 0                   | 0                   |
|    | <b>STATUS</b>   |               | <b>Reject</b>       | <b>Reject</b>       | <b>Reject</b>       |

**NOTE:** 1 This is an EXCEL spread sheet that will perform the calculations: Evaluation Grid Architect.xlsx

**TABLE 3 Continued**

**2. EVALUATION GRID SCORING**

**EVALUATION                      CRITERIA**

|                |   |                     |  |
|----------------|---|---------------------|--|
| <b>SCORING</b> | 3 | Highly Advantageous |  |
|                | 2 | Advantageous        |  |
|                | 1 | Less advantageous   |  |
|                | 0 | Unacceptable        |  |

**NOTE: Any applicant with a "0" will be disqualified**

**MINIMUM REQUIREMENTS**

|                |   |     |
|----------------|---|-----|
| <b>SCORING</b> | 1 | Yes |
|                | 0 | No  |

**NOTE: Any applicant with a "0" will be disqualified**