

REQUEST FOR PROPOSALS

FORMER NEIGHBORHOOD ELEMENTARY SCHOOLS ATHOL, MASSACHUSETTS



Proposals due on or before Thursday, September 12, 2019 at 2:00 p.m. to:

Shaun A. Suhoski, Town Manager, CPO
Town Hall, Room 17
584 Main Street
Athol, MA 01331

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I. OVERVIEW

Background Information

The Town of Athol seeks qualified developers to design and implement a productive reuse plan for two former neighborhood elementary schools wholly located within a single town block.

The successful proposal will be one that, as a minimum requirement, includes a detailed *pro forma* budget and documents the financial capacity of team. The selected proponent will clearly demonstrate successful prior experience with projects similar to that proposed. All proposed projects must result in generation of property tax via placement on tax rolls, or, be subject to a payment-in-lieu-of-taxes (PILOT) agreement acceptable to the Town.

Proposals that include the following elements may be considered highly advantageous in the comparative rating criteria outlined in Section VI below:

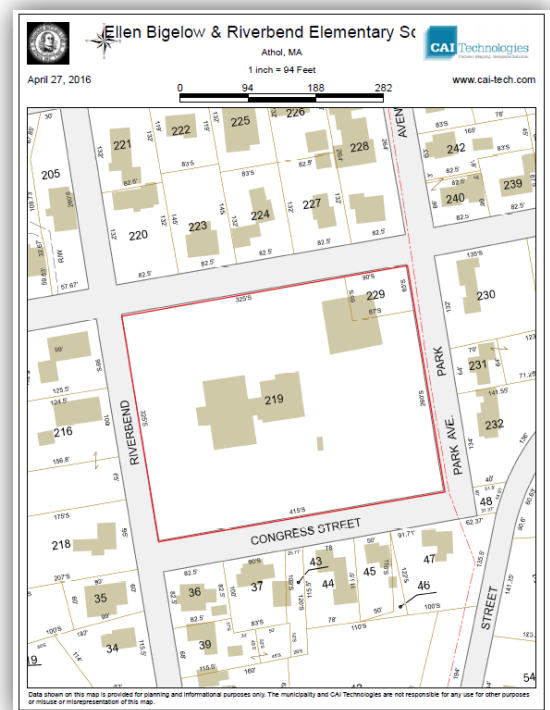
- Preserve existing historic façades of one or both buildings
- Provide a housing options for the elderly to age-in-place
- Provide housing options to a range of income including affordable units
- Incorporate green space and/or a neighborhood park on the site
- Incorporates on-site permanent jobs and/or property management
- Include “green” energy and/or LEED principles in redevelopment

While the above elements carry additional weight in the comparison of proposals, however, the Town does not wish to limit the scope of responses that are responsible and beneficial to all parties.

Proposals that integrate with the neighborhood, allowed shared public use of green space or a park on site, and generally pose little conflict with the existing residential nature of the area are preferred.

Site Location

According to a summary report of school district properties the subject site is comprised of two parcels of land totaling approximately 3.25 acres bounded by Riverbend, Allen and Congress streets, and Park Avenue as illustrated to the right.



Illustrative only from Assessor records.

Project Parameters

The Town is soliciting proposals from developers interested in completing a thorough redevelopment and reuse of the property. This Request for Proposals has been developed to provide maximum flexibility to potential developers. Developers are requested to provide a development concept plan that is consistent with the character of the surrounding area and cognizant of the preferred criteria.

II. SITE INFORMATION

Property and Building Overview

The two school buildings are located on roughly 3.25 acres of land as noted above.

The former Ellen Bigelow School (125 Allen St.) was constructed in 1912 with additional renovation in the basement completed in 1954. The school has a listed usable area of nearly 16,900 square feet and school district records indicate that the roof was replaced in 2007 with a “Firestone Rubber Membrane” with a 15-year life expectancy. The H.B. Smith 11-section boiler was converted from coal to oil (three, 330-gallon tanks in boiler room) and is believed to date to 1911 feeding a steam system.



Aerial view of locus looking west.

The former Riverbend School (184 Riverbend St.) was constructed in 1907 with an addition built in 1937. The school has a listed usable area of just over 30,000 square feet. School records indicate that the asphalt shingles (and “Sarnafil” membrane on the

flat section) were each replaced in 1997 with a 20-year anticipated lifespan. The 1967 H.B. Smith boiler is fired by oil (three, 330-gallon tanks in room adjacent to boiler room) and feeds a steam system. Riverbend also houses a kitchen and cafeteria that served the student population of both schools.

NOTE: both buildings were occupied and in use as elementary schools through June 2016, however, the Town offers no opinion or warranty as to the condition or operability of the above-described systems and proponents bear all responsibility to verify any data presented herein.

Environmental Conditions / No Warranty

The property is being sold in an “as is” condition, and the Town makes no representations regarding the current structural or environmental conditions, including, but not limited to, termite infestation, the presence of asbestos or lead paint, soil contamination, or any other contamination. The selected developer will accept the property “as is” with no exceptions.

The Town has not and will make any representation or warranty as to the condition of the building, property or general environs. The selected developer shall acknowledge that no such representation or warranty has been made, and the property has been taken in an “as is” condition without recourse to, or remedy from, the Town for any condition, liability or event connected to the property.

The Town hereby gives notice that it will not be bound by any statement, representation, or information pertaining to the property or its condition by any employee, agent, elected or appointed official, or any other person or persons acting, or purporting to act, under color of authority of the Town of Athol.

Zoning

The property is zoned Multi-Family Residential (RA) under the Town of Athol’s Zoning Bylaw (available at www.athol-ma.gov).

The property is also contained within the “Adaptive Reuse Overlay” zoning district which augments the uses allowed in the underlying zoning district (See Section 3.27 of the Zoning Bylaws).

Any use inconsistent with the Zoning Bylaw will require a variance from the Zoning Board of Appeals, or a zone change approved by Town Meeting. Specific uses may require special permits, site plan approval, or other approvals from the Planning Board, Board of Health or other Town agencies.

The Town makes no representations or guaranties regarding the developer’s success in obtaining such approvals, variances, or permits.

Floor Plan

Ellen Bigelow School has approximately 16,863 square feet within three stories (basement, first floor, top floor). A hand-drawn schematic of the floor plans are incorporated as **Attachment “A”** hereto.

Riverbend School has approximately 30,087 square feet within three stories (basement, first floor, top floor). A hand-drawn schematic of the floor plans are incorporated as **Attachment “B”** hereto.

Assessor record information is incorporated as **Attachments “C” and “D”** hereto and available scanned architectural drawings are available in .pdf format to all bona fide requestors of the RFP. The Town assumes no liability for the information therein.

III. PROPOSAL AND SELECTION PROCESS

General Conditions

The Town of Athol, in its sole and absolute discretion, with or without cause, and without liability to the Town or any agent of the Town, reserves the right to:

- Accept or reject any or all proposals, either in whole or part, waive any portion or requirement of this RFP, cancel this RFP at any time, and/or take any action the Town, in its sole discretion, believes to be in its best interest. The Town shall take action upon the RFP within sixty (60) days after the opening of proposals.
- Retain all proposals as official documents as the sole property of the Town of Athol, and to use them in whatever manner it deems appropriate.
- Allow or refuse any request by any proposer to correct clerical errors or omissions in any proposal after the deadline for submission.
- Investigate the financial capability, integrity, experience and quality of performance of any proposer including major stockholders or principals.
- Request an oral presentation from any proposer, and/or
- Request any additional information from any proposer.
- Pre-award negotiations may be conducted with the selected proposer.
- The selected developer shall be required to comply with all applicable federal, state and local laws in the performance of the services.
- The selected developer shall provide a certificate of insurance evidencing a minimum of \$1,000,000 in professional liability insurance, and naming the Town of Athol as an additional insured.
- The selection of the successful proposal shall be made without regard to race, color, sex, age, religion, political affiliation and/or national origin. EOE/AA.

Required forms (incorporated in Attachment “E” hereto):

- Tax Certification Affidavit, Signed and Notarized
- Non-Collusion Statement
- Disclosure of Beneficial Interests

- Bid Form to be filed separately as “Price Proposal” which provides the amount of site acquisition payment, and any terms

Expenses

All proposers responding to this RFP do so at their sole expense and risk. The Town of Athol assumes no financial or other obligation to proposers that respond to this RFP or to their agents.

Non-confidentiality

All proposals shall become public records, and will be subject to disclosure under the Massachusetts Public Records Law.

Selection Process

A review committee will be appointed by the Chief Procurement Officer to review and rank complete proposals. This committee may be composed of elected or appointed public officials, or private citizens with particular knowledge or expertise in the field of redevelopment. The Committee may, in its sole and absolute discretion, reject any and all, or parts of any and all proposals; may re-advertise this RFP; may postpone or cancel at any time this RFP process; may change, or re-schedule the timetable of events. The Committee reserves the right to waive any minor informalities pertaining to any proposals received.

The determination of the criteria and process whereby proposals are evaluated, the decision as to who will receive preferred developer status, or whether or not an award shall ever be made as a result of this RFP shall be in the sole and absolute discretion of the Town of Athol.

If a non-profit organization is chosen as the preferred developer, it will be expected to enter into an agreement with the Town to make annual in-lieu-of tax payments in an amount equal to that which would be paid to if the developer were not a non-profit entity, said amount to be determined by the Board of Assessors.

The Town of Athol has endeavored to provide accurate information in this RFP, however, it is the responsibility of the proposer to examine the property and to investigate to their satisfaction questions or any other matter relating to the property. Reasonable access will be provided to all proposers to investigate the property. Any additional information that comes into the possession of the Town as the result of our participation in such investigations shall be provided to all proposers.

Selection Criteria

Proposals will be evaluated and ranked according to the following criteria with added weight for highly preferred outcomes outlined herein:

- Qualifications of the Proposer and Development Team.
- Compatibility with the surrounding neighborhood and district.

- Adequacy of the management plan.
- Financial feasibility.
- Financial burden on the Town.
- Potential financial benefits for the Town.
- Potential non-financial benefits for the Town.
- Adequate work program and project schedule.
- Effect on traffic, parking and other surrounding infrastructure.
- Preservation of the integrity and character of the structure.

Submission of complete proposal must be received no later than September 12, 2019 at 2:00 p.m. at the following address:

Town of Athol
 Attn: Town Manager
 584 Main Street, Room 17
 Athol, MA 01331

Submitting questions to the Review Committee.

All Questions must be received in writing at the Office of the Athol Board of Selectmen no later than 14 days before the deadline for submission of proposals. Questions may be submitted by mail, in person or by email to selectmen@townofathol.org, but the entity submitting the question bears all risk and responsibility to ensure that the question is actually received by the deadline.

Copies of all questions, along with written answers will be provided to all entities that have requested a copy of the RFP no later than seven days before the deadline for submission of proposals.

NOTE: A mandatory walkthrough and inspection of the property for all prospective proposers will held on Tuesday, August 27, 2019 at 10:00 a.m.

IV. SCHEDULE

The anticipated schedule, subject to change at the discretion of the Town, is as follows:

July 31, 2019	RFP advertised in <i>Central Register</i> , Town of Athol Web site (www.athol-ma.gov) and other media
July 31, 2019	RFP available at Selectmen’s Office or electronically by request to: selectmen@townofathol.org
August 27, 2019	Mandatory walkthrough and inspection at 10:00 a.m.
August 29, 2019	Deadline for electronic submission of questions.
September 5, 2019	Deadline for returning answers.
September 12, 2019	RFP response due no later than 2:00 p.m.
September 2019	Review and recommendation by committee

V. RFP SUBMITTAL REQUIREMENTS

The submission package must be submitted as follows:

Proposers are required to submit one (1) unbound original and (6) bound copies of a Non-price Project Proposal and one (1) original sealed "Price Proposal" using the form provided with this document. **An electronic copy of the proposal shall be submitted in .pdf on a USB flash drive or other approved format.**

Each proposal will include the following:

PROPOSER INFORMATION

Proposer Identification

- Legal name and principal office address
- Telephone number and email address
- Name of agent who is authorized to contractually bind the Proposer; and
- Name, address and telephone number of principal contact person if different than the authorized agent

Status of the Proposer's Organization

- The state of incorporation, if a corporation, or state or registration, if a partnership.
- Identify the Proposer's principal owners, if a corporation, general partners, if a partnership and/or co-venturers involved in the proposal including:
 - Legal names and addresses
 - Relationship and share of each participant's interest in the Proposer's entity and proposal;
- If the Proposer is a subsidiary of a parent corporation or partnership, provide the legal name, principal office address, and state of incorporation or registration of the parent firm.

Letters of Intent from each firm comprising the project team expressing their intent and availability to perform the work.

QUALIFICATIONS OF PROPOSER AND FIRMS COMPRISING THE DEVELOPMENT TEAM

Background Profiles

Provide background profiles of the Proposer and each firm on the team including history of the firm, staff composition and availability, scope of services provided and technical capabilities.

Team Location

Identify the location of the Proposer or prime firm's field office and locations of all participating firm offices.

Overall Team Organization and Project Management

Define overall team organization and project management of the Proposer and firm(s) retained to do the planning, design, financing, construction, implementation and operation of the project. Identify and discuss responsibilities of the Proposer or firm that will serve in the lead or "prime" role.

Proposer and Firm Roles, Responsibilities and Services

Describe the individual role, responsibilities and scope of services of the Proposer and each participating firm.

Proposer and Firm References

Provide a minimum of (3) three references for projects similar in scope and intensity as the proposed project. Provide a current name, address and telephone number for each reference that was directly involved and can be contacted by the Town.

Qualifications of Key Team Members / Resumes

Provide detailed resumes of the Proposer and principal team members, which include the following:

- Educational and technical training;
- Licensing and professional affiliations;
- Technical expertise;
- Work experience on similar project types; and
- Description of participation on representative projects requested herein.

PRIOR PROJECTS DESIGN AND CONSTRUCTION EXPERIENCE**Representative Projects**

Identify projects completed by the Proposer and development team, which are similar in scope and intensity to the proposed project. For each, provide the following:

- Brief narrative for each project identifying the type, location, size, cost, duration, role and scope of services provided;
- Photographs of each project listed; and
- Names, addresses, email addresses and telephone numbers of the clients for each project who are authorized to respond to inquiries from the Town.

FINANCIAL POSITION OF THE PROPOSER

Authorization to Verify Qualifications

Provide a written and signed statement from the Proposer's principals providing the Town with authorization to verify financial and other qualifications of the Proposer.

CONCEPTUAL DEVELOPMENT PLAN

Proposers shall use this opportunity to demonstrate innovative design and implementation skills. Any plans may be conceptual in format but should accurately reflect the requirements of the RFP as well as the Proposer's program requirements.

The Town encourages proposals which clearly convey the proposal's underlying functional linkages, practical physical relationships, ability to work in the selected location and merits of the site/building design concept. Documentation should include a narrative outlining the context and site analysis, program and design concept including the provision of access for pedestrians, vehicular traffic and service vehicles and the relation to or requirement for parking. Responses should include:

- Illustrative site plan showing setbacks, height of structures, number of housing units, square footage of retail, open space, public amenities, project parking spaces, public parking spaces, linkages to downtown core, open space and other site elements. Acceptance of the project does not guarantee site plan approval by the Athol Board of Planning and Community Development;
- Conceptual floor plan for each proposed level;
- Design features of housing units, if any;
- Conceptual illustration of landscaping of the entire site;
- General description of an approach to lighting to promote security and pedestrian safety.
- A parking plan that includes adequate parking for employees, customers and or residents of the property.
- Program for on-site jobs and/or property management function.

The Town of Athol shall not be liable for costs incurred in the preparation of a response to this RFP or in conjunction with any presentations before Town agencies, the public or awarding authorization and all materials developed under this RFP shall become the possession of the Town of Athol.

WORK PROGRAM AND PROJECT SCHEDULE

Each Proposer shall submit a work program identifying major work phases and an overview of the work tasks required to finance, design, construct, implement and operate the project. The work program shall include a plan demonstrating how the work will be managed, coordinated and undertaken by the various members of the development team.

The work program shall also include a project schedule, which graphically depicts the estimated timeframe required to complete the anticipated work tasks. The schedule shall identify any events, which may increase or decrease the estimated timeframe and their potential impact on the proposed project schedule.

FINANCIAL PLAN / PRO FORMA BUDGET

Project Financing Package

Each Proposer shall submit a preliminary financing package, including a preliminary budget, which defines how the project will be funded. Such financial package shall identify the total project cost and a breakdown between equity contributed, equity raised and debt financing, provide specific details on the source and availability of all funding components and identify special funding or land ownership issues that involve commitments by the Town.

MANAGEMENT PLAN

Ownership

Each Proposer shall provide a description of how ownership of the project will be structured as follows:

- If the Proposer is to have 100% ownership, provide a statement to that effect;
- If some other existing legal entity is to have a 100% ownership position, provide the legal name, principal office address, and form of organization and state of incorporation or registration; and
- If ownership entails the formation of a separate legal entity, describe the structure of the entity, the state of incorporation or registration and the principals involved.

Operation and Management

Each Proposer shall provide a description of the firm or organization that will be responsible for operating and managing the project including the following:

- Discuss the form of the relationship to be established between the Proposer and the management organization (i.e., division or subsidiary of the Proposer, partnership, lease management contract, etc.).
- Provide a summary of the qualifications and experience of the proposed management organization, especially in regard to a project of similar size and characteristics.

VI. REVIEW COMMITTEE CRITERIA

All complete and responsive proposals that are received will be evaluated by the evaluation committee. The evaluation will be timely, based on the information

submitted in response to Section V as well as any related information that the Town may discover in analyzing or verifying information submitted in the proposal; or in any subsequent submissions.

The relative merits of each proposal shall be rated for each criterion listed below:

Highly Advantageous (5 points) – The proposal excels on the specific criterion.

Advantageous (3 points) – The proposal fully meets the evaluation standard of the specific criterion.

Not Advantageous (1 point) – The proposal does not fully meet the evaluation standard of the specific criterion.

Non Responsive / Unacceptable (0 points) – The proposal fails to meet the criterion.

Criterion #1: Program and Design

Highly Advantageous (HA) – The proposal enhances the surrounding community. The plan seeks to preserve the historic façade of the structures and utilizes green building technologies. The plan includes housing units conducive for an elderly population to “age-in-place” and/or have access to supportive services. The plan includes housing options for a range of income including affordable units. The plan incorporates green space or open space accessible to the neighborhood.

Advantageous (A) – The proposal is consistent with the residential character of the neighborhood. The plan offers public benefits such as opportunities for employment, equity investments, education use and/or recreation for residents.

Not Advantageous (NA) – The proposal is inconsistent with the Town and/or neighborhood plans. The impacts of the project are not fully mitigated.

Criterion #2: Developer Capability

Highly Advantageous (HA) – The Development Entity has an identified team with a successful track record to finance, develop, operate and complete projects of comparable type, size, scale, and complexity on time and within budget forecast.

Advantageous (A) – The Development Entity has an identified team with a successful track record of development projects but representative projects are not comparable type, size, scale or complexity, or the projects were not completed on time or within budget forecast.

Not Advantageous (NA) – The Development Entity has not demonstrated a successful track record on projects of this magnitude and/or complexity.

Criterion #3: Business Deal and On-site Job Creation

Highly Advantageous (HA) – The proposal is financially feasible, requires no public commitments and maximizes financial returns including new municipal revenue. The

plan facilitates creation of more than one permanent versus construction-only jobs on site. The proposal minimizes Town financial assistance and/or regulatory waivers.

Advantageous (A) – The proposal financing is feasible but requires further details and/or public commitments or tax incentives. The plan facilitates the creation of at least one permanent versus construction-only jobs on site. Financial return to the Town is limited.

Not Advantageous (NA) – The proposal’s financing is questionable and/or requires significant, unsecured funding. No permanent job creation is likely. Financial return to the Town is limited.

Criterion #4: Implementation Plan / Timeline

Highly Advantageous (HA) – The work plan is fully detailed and reasonable. The development timeframe expedites the return of the property to a productive use. The impact of the project on traffic, transportation and surrounding land uses is minimized.

Advantageous (A) – The work plan needs further detail but appears reasonable given the proposed project. The development time frame is realistic but lengthy or dependent upon many variables. The impacts of the project as proposed will receive additional mitigation and/or land use or other regulatory concession.

Non-Advantageous (NA) – The work plan lacks sufficient detail or fails to address major tasks. The timeframe is unrealistic. The project impacts are not mitigated.

The Committee may request the highest rated proposer to conduct an in-person presentation of their project before a final recommendation is made to the Board of Selectmen.

Rule of Award: The most advantageous proposal from a responsive and responsible proposer, taking into consideration price and all other evaluation criteria set forth above, will be selected, though the Town reserves its right to not make any award if it be in the best interests of the Town.