



CITY OF SOMERVILLE, MASSACHUSETTS
SOMERVILLE AFFORDABLE HOUSING TRUST FUND
JOSEPH A. CURTATONE
MAYOR

Mary Cassesso, Managing Trustee

Trustees
Ben Ewen-Campen
Michael Feloney
Kathryn Gallant
Donna Haynes
Daniel LeBlanc
Andrea Shapiro

January 22, 2019

INVITATION AND INSTRUCTIONS TO PROPOSERS

CITY OF SOMERVILLE
AFFORDABLE HOUSING TRUST FUND
TENANCY STABILIZATION PROGRAM

INTRODUCTION

The City of Somerville Affordable Housing Trust Fund (SAHTF) is soliciting Proposals to operate and administer the Tenancy Stabilization Program in an amount of up to \$60,000 per year for up to three years, of which up to 15% shall be allocated to administrative fees. The contract term is expected to begin July 1, 2019. Proposals submitted should indicate the end date of a preferred contract term.

The purpose of this Request for Proposal (RFP) is to select an agency/entity to administer and operate the Somerville Affordable Housing Trust Fund's Tenancy Stabilization Program. This program provides up to \$3,000 in grant funds to eligible applicants who are in need of money for first and last month's rental payments, security deposits, and rental arrears in order to help stabilize clients' housing situations. Other uses for Tenancy Stabilization Program Funds may be allowed if they are determined to be eligible. Payments are made directly to landlords on behalf of tenants and must be tied to a specific housing unit.

This document is intended to provide a common and uniform set of instructions to guide Proposers through the proposal process.

BACKGROUND

The Somerville Affordable Housing Trust Fund (SAHTF) was created in 1989, by a city ordinance, and its first programs began in 1991. Its purpose is to preserve and create affordable rental and homeownership units in Somerville and carry out programs to directly assist homeowners and renters.

The Somerville Affordable Housing Trust Fund operated a Renter Revolving Loan Fund from 1992 through 2006. The program was developed to provide stabilization to low-income households who found themselves in rent arrears and at risk of eviction. In 2006, the Somerville Affordable Housing Trust Fund ended the Renter Revolving Loan Fund and replaced it with the Tenancy Stabilization Program and solicited proposals from local agencies to administer the program. From 2006 to 2012, the program had been operated by the Somerville Community Corporation. From 2012 to 2018, the Somerville Homeless Coalition operated the program and from 2018 to 2019 the program has been operated by Just-a-Start Corporation. The SAHTF is seeking an agency or other entity to administer the Tenancy Stabilization Program, as outlined below.

PROGRAM REQUIREMENTS

The SAHTF has developed several guidelines for the Tenancy Stabilization Program. Proposers must take into account these requirements when proposing a program. The requirements are as follows:

- 1) Eligible Uses of Funds include first and last month's rental payments, security deposits, and rental arrears in order to help stabilize clients' housing situations. Other uses of funds may be allowed if they are determined to be eligible. Use of funding should be tracked by these categories for the Trust. No funds may be used for ineligible purposes.
- 2) Payments of Trust funds must be made directly to landlords on behalf of tenants and must be tied to a specific housing unit.
- 3) Eligible applicants must have incomes less than or equal to 80% of Area Median Income.
- 4) Applicants may receive up to \$3,000 for the above stated uses, but the grant amount shall in no case exceed the amount needed to cover the eligible uses.
- 5) Funds will be distributed to applicants as a grant rather than a loan, but applicants should be offered the opportunity to enter into, and comply with, a grant agreement with the agency/entity outlining how the applicants will participate in supportive services or on-going counseling as a condition of receipt of funds. Such supportive services or on-going counseling must be funded using sources other than the award from the SAHTF.

SCOPE OF SERVICES

The contracted agency/entity will be responsible for operating the Tenancy Stabilization Program, which includes the following components. Proposers may suggest alternative methodologies if they believe such methodologies would be more appropriate.

1. Conduct Outreach to Potential Eligible Renters.
2. Certify Income Eligibility. Verify that renters have a household income less than or equal to 80% of Area Median Income.

3. Create Supportive Service Agreements with Grantees. The contracted agency/entity will be expected to provide supportive services to grantees, and must leverage outside resources or internal capacity to provide these services.
4. Submit Quarterly Progress Reports. Identify goals and define outcomes on which to report and submit to SAHTF on a quarterly basis.
5. Distribute Funds for Assistance. The contracted agency/entity will be expected to make the initial payment for rental assistance to be reimbursed by the City at a later date. Checks **must** be directly payable to the landlord.
6. Prepare Requisitions for Funds. The City of Somerville administers the Trust's finances. The contracted agency/entity will submit invoices to SAHTF on a monthly basis for reimbursement of expenses, with documentation of funds expended, such as copies of checks to landlords or rent receipts.

CONTRACT TERM

This contract will be for a period up to three years. The contract start date is expected to be July 1, 2019.

PROPOSAL REQUIREMENTS

Responses are due electronically by 10:00am on Tuesday, March 5, 2018 and respondents should also submit 10 printed copies (collated), by hand-delivery or by mail, postmarked on or before noon on Tuesday, March 5, 2018.

The electronic copy should be sent by email to Heidi Burbidge at hburbridge@somervillema.gov.

The printed copies should be sent or delivered to:

Somerville Affordable Housing Trust
Attn: Heidi Burbidge
City Hall Annex, 2nd floor
50 Evergreen Avenue
Somerville, MA 02145

If you have any questions, please do not hesitate to contact Heidi Burbidge at 617-625-6600 x2587 or via email at the email address listed above.

REQUIRED SUBMISSIONS

A. Contact Information

Including Agency Name, Principal Contact Name and Position, Phone Number, Fax Number and Email Address.

Please include the name and email address of the person who will be submitting the quarterly progress reports and the contact information for the person who will be submitting the monthly invoicing.

B. Transmittal Letter

The Proposal shall include a one-page letter of transmittal signed by the principal(s) of the proposing agency/entity and addressed to: Mary Cassesso, SAHTF Managing Trustee at the above address.

C. Methodology

The Proposal shall include a detailed description of the proposed methodology for conducting the Tenancy Stabilization Program given the Program Requirements and Scope of Services described above, and a detailed description of how the Proposer meets the evaluation criteria described below. Please ensure that you include how you intend to:

- 1) Promote opportunities to submit program applications
- 2) Determine applicants' income eligibility
- 3) Determine the grant amount for each applicant
- 4) Create supportive service agreements with grantees
- 5) Provide proposed supportive services to grantees
- 6) Coordinate with local agencies
- 7) Encourage and inform potential grantees of additional resources and services that they can access, to both allow the grant monies to be stretched as far as possible and to ensure stabilization
- 8) Track stabilization

D. Project Budget

One Page Project Budget: This should include Trust Fund contribution for assistance as well as leveraged resources for supportive services.

E. Composition of Team/Professional Qualifications

The Proposal must include a) agency/entity's background and mission; b) agency/entity's qualifications for the administration of the program; and c) proposed staffing and qualifications of staff.

F. References

The Proposal shall include three references attesting to the agency's background and ability to administer a program of this scope. Please include a name and contact phone number for all references.

SELECTION PROCESS

The SAHT will review Proposals received at the April 2019 Trust meeting, and subsequent meetings as necessary.

The SAHTF shall evaluate all Proposals in accordance with the procedure set forth in M.G.L. c. 30B, § 6. The Trust reserves the right to require a personal interview at which all team members should be present.

EVALUATION CRITERIA

The following criteria will be considered in evaluating Proposals:

- Whether the Proposal includes the following basic elements:
 - Methodology for administering the Tenancy Preservation Program
 - Explanation of supportive services to be provided to Grantees
 - A clear plan for developing a stabilization data collection system
- Experience
 - Whether the proposing agency/entity has successfully administered a similar program
- Somerville/Non-Profit Preference
 - Whether the proposing agency/entity is a Somerville business
 - Whether the proposing agency/entity is a non-profit
- References
 - Whether the proposing agency/entity's references suggest that it will perform in a timely, competent, and professional manner and can work collaboratively with the SAHTF.

RESERVATION OF RIGHTS

The SAHTF reserves the right to extend the deadline for submission of Proposals and/or request supplementary information prior to the deadline for submission, to waive minor informalities, and/or to reject all Proposals if in the best interests of the SAHTF.

PROFESSIONAL SERVICES CONTRACT

The selected agency/entity will be expected to execute a Professional Services Contract.

ADDITIONAL INFORMATION

For additional information, please contact Heidi Burbidge at the above address or by telephone at (617) 625-6600, x 2587, by fax at (617) 666-8035 or by e-mail at hburbidge@somervillema.gov.

PROPOSERS' CHECKLIST

Please ensure that the first two documents on this checklist are included with your proposal, if applicable.

_____ Somerville Living Wage Form

_____ Campaign Contribution Ordinance and Disclosure Form (This form is applicable for grant agreements of \$50,000 and more. If the proposal is for less than \$50,000, this form is not required).

Required with Contract, Post-Award

(These documents will be required of respondents that receive funding awards. Do not submit them now).

_____ Certificate of Good Standing from the Secretary of the Commonwealth of Massachusetts

_____ Grant and Trust Disclosure Form. See blank form included in the RFP package, for reference only. Do not provide this form with proposal. It must be completed post-award with current information at the time the contract is being drafted.

_____ Certificate of Signature Authority. This certificate will be required of respondents that are awarded funds. Do not provide this now. It must be signed and dated the same day, or after, the contract is signed by the recipient agency.



SOMERVILLE LIVING WAGE ORDINANCE CERTIFICATION FORM
CITY OF SOMERVILLE CODE OF ORDINANCES SECTION 2-397 et seq.*

Instructions: This form shall be included in all Invitations for Bids and Requests for Proposals which involve the furnishing of labor, time or effort (with no end product other than reports) by vendors contracting or subcontracting with the City of Somerville, where the contract price meets or exceeds the following dollar threshold: \$10,000. If the undersigned is selected, this form will be attached to the contract or subcontract and the certifications made herein shall be incorporated as part of such contract or subcontract. **Complete this form and sign and date where indicated below on page 2.**

Purpose: The purpose of this form is to ensure that such vendors pay a “Living Wage” (defined below) to all covered employees (i.e., all employees except individuals in a city, state or federally funded youth program). In the case of bids, the City will award the contract to the lowest responsive and responsible bidder paying a Living Wage. In the case of RFP’s, the City will select the most advantageous proposal from a responsive and responsible offeror paying a Living Wage. In neither case, however, shall the City be under any obligation to select a bid or proposal that exceeds the funds available for the contract.

Definition of “Living Wage”: For this contract or subcontract, as of 7/1/2018 “Living Wage” shall be deemed to be an hourly wage of no less than \$12.80 per hour. From time to time, the Living Wage may be upwardly adjusted and amendments, if any, to the contract or subcontract may require the payment of a higher hourly rate if a higher rate is then in effect.

CERTIFICATIONS

1. The undersigned shall pay no less than the Living Wage to all covered employees who directly expend their time on the contract or subcontract with the City of Somerville.
2. The undersigned shall post a notice, (copy enclosed), to be furnished by the contracting City Department, informing covered employees of the protections and obligations provided for in the Somerville Living Wage Ordinance, and that for assistance and information, including copies of the Ordinance, employees should contact the contracting City Department. Such notice shall be posted in each location where services are performed by covered employees, in a conspicuous place where notices to employees are customarily posted.
3. The undersigned shall maintain payrolls for all covered employees and basic records relating hereto and shall preserve them for a period of three years. The records shall contain the name and address of each employee, the number of hours worked, the gross wages, a copy of the social

* Copies of the Ordinance are available upon request to the Purchasing Department.

Form: _____
Contract Number: _____

security returns, and evidence of payment thereof and such other data as may be required by the contracting City Department from time to time.

4. The undersigned shall submit payroll records to the City upon request and, if the City receives information of possible noncompliance with the provisions the Somerville Living Wage Ordinance, the undersigned shall permit City representatives to observe work being performed at the work site, to interview employees, and to examine the books and records relating to the payrolls being investigated to determine payment of wages.

5. The undersigned shall not fund wage increases required by the Somerville Living Wage Ordinance by reducing the health insurance benefits of any of its employees.

6. The undersigned agrees that the penalties and relief set forth in the Somerville Living Wage Ordinance shall be in addition to the rights and remedies set forth in the contract and/or subcontract.

CERTIFIED BY:

Signature: _____
(Duly Authorized Representative of Vendor)

Title: _____

Name of Vendor: _____

Date: _____

INSTRUCTIONS: PLEASE POST

**NOTICE TO ALL EMPLOYEES
REGARDING PAYMENT OF LIVING WAGE**

Under the Somerville, Massachusetts' Living Wage Ordinance (Ordinance No. 1999-1), any person or entity who has entered into a contract with the City of Somerville is required to pay its employees who are involved in providing services to the City of Somerville no less than a "Living Wage".

The Living Wage as of 7/1/2018 is **\$12.80** per hour. The only employees who are not covered by the Living Wage Ordinance are individuals in a Youth Program. "Youth Program" as defined in the Ordinance, "means any city, state or federally funded program which employs youth, as defined by city, state or federal guidelines, during the summer, or as part of a school to work program, or in any other related seasonal or part-time program."

For assistance and information regarding the protections and obligations provided for in the Living Wage Ordinance and/or a copy of the Living Wage Ordinance, all employees should contact the City of Somerville's Purchasing Department directly.



**CITY OF SOMERVILLE CAMPAIGN CONTRIBUTION ORDINANCE SEC. 15-72*
MANDATORY DISCLOSURE AND CERTIFICATION FORM**

INSTRUCTIONS: APPLICANTS, PLEASE COMPLETE THE ENTIRE FORM AND FILE WITH THE SAME CITY OFFICE OR AGENCY WITH WHOM YOU FILED OR WILL FILE BELOW APPLICATION.

PART I. APPLICATION FOR ITEM

Describe the item you have, or will apply for, relating to this disclosure:

ITEM:	
TYPE (X):	<input type="checkbox"/> Contract <input type="checkbox"/> Zoning Relief <input type="checkbox"/> Real Estate <input type="checkbox"/> Financial Assistance
CITY DEPT. OR AGENCY:	

PART II. APPLICANT INFORMATION

Provide the following information for the Applicant:

NAME:	
ADDRESS:	
TELEPHONE NO.:	
E-MAIL:	

On Schedule A, you must also provide the same information for the Applicant’s principals, chief executive officer, president, chief financial officer, treasurer, chief operating officer, chief procurement officer, directors, or persons performing similar functions, or shareholders in excess of ten percent and managing agent to the extent applicable. **Please complete Schedule A. If not applicable, please check N/A on Schedule A.**

PART III. CAMPAIGN CONTRIBUTION DISCLOSURE

On Schedule B, Applicants must disclose all contributions made by the applicant during the 12 months prior to the application (identified in Part I), to any person who was a candidate for elective office of the City of Somerville (mayor, board of aldermen, and school committee). The attribution rules in Section 15-73 of the Somerville Code of Ordinances shall apply to the contributions that must be disclosed. **On Schedule B**, applicants must also disclose such contributions made by persons attributed to the applicant under the ordinance. If the applicant is an individual, any such contributions made by the individual, any spouse of the individual, and any children of the individual must be disclosed. If the applicant is not an individual but a corporation, partnership or limited liability corporation, then any contributions made by any of its chief executive officer, president, chief financial officer, treasurer, chief operating officer, chief procurement officer, directors, members, managers, principals, or persons performing similar functions, or shareholders in excess of ten percent, and their spouses and children, must be disclosed. **Please complete Schedule B. If disclosure is not required, please check N/A on Schedule B.** *Note: Contributions made before January 1, 2017 are not required to be disclosed.*

* Please see the Pay to Play and Campaign Contribution Ordinance for definitions and all requirements.

PART IV. SUBCONTRACTOR INFORMATION

Have you applied for a Contract and intend to use a subcontractor on this Contract? Yes No

If “**Yes**”, complete **Schedule C**. If “**No**”, **proceed to Part V**.

PART V. SIGNATURE, CERTIFICATION, AND ATTESTATION:

I, the undersigned applicant, hereby further certify as follows: If awarded the item that is applied for (as identified above) under subsections (a), (b), (c), or (d) in Section 15-72 of the Somerville Code of Ordinances, the Applicant, and anyone attributed to the Applicant, and if the application is for a contract any subcontractor used on the contract, will not make any contribution in any calendar year in an amount in excess of \$500.00 to any individual incumbent or to any individual candidate for elective office of the City of Somerville for the next four (4) calendar years following the award of the item, or for the duration of the term of the contract, whichever is longer.

Signed under the pains and penalties of perjury:

Signature of Affiant: _____ Title: _____

Printed Name of Affiant: _____ Date: _____

Subscribed and sworn before me this ____ day of _____, 2____.

(Witnessed or attested by)

(Seal)

My Commission expires:

THIS FORM SHALL BE OPEN TO PUBLIC INSPECTION



GRANT AND TRUST FUNDS DISCLOSURE FORM
PURSUANT TO CITY OF SOMERVILLE CODE OF ORDINANCES CHAPTER 15

(copies of the Ordinance are available upon request)

Instructions: All applicants for grant and/or trust funds administered by the City must complete this form as part of its application submission to the City of Somerville. Complete all sections of this form.

Section 1

Legal Name of Applicant:

Indicate whether the applicant had any grant, contract, or agreement with a federal, state or local agency terminated within the last three (3) years.

Check One:

- Yes** (If yes, please identify the grant, contract, or agreement including parties, term, and cause of termination on an additional page.)
No

Section 2

Applicants are required to disclose any circumstances constituting a conflict of interest or potential conflict of interest arising from or relating to the proposed grant or trust disbursement, whether real or apparent.

Conflict of Interest Prohibited. No employee, officer or agent of the grantee shall participate in any particular matter, including but not limited to, the selection, or in the award or administration of a contract, grant or subgrant, or employment agreement administered by way of funds received by the City of Somerville if a conflict of interest, real or apparent, would arise. Such a conflict would arise when:

- 1) an employee, officer or agent, or
- 2) any member of his or her immediate family, or
- 3) a business organization in which he or she is serving as officer, director, trustee, partner, or employee; or
- 4) any person or organization with whom he or she is negotiating or has any arrangement concerning prospective employment,

has a financial or other interest in the person or entity selected for an award, or a contract, grant, subgrant, or employment agreement of the grantee or the funds for which originate from or are awarded through the city.

Check One:

No Conflict Of Interest

Potential or Actual Conflict of Interest (If checked, disclose in detail all relevant facts, including names of individuals or organizations, relevant contract, grant, subgrant or employment agreement, and source of funding on an additional page.)

Section 3

Attach a copy of applicant’s policy addressing conflicts of interest that may arise involving management, employees and the members of its board of directors or other governing body. See the *City of Somerville Code of Ordinances Section 15-42(c)* for complete requirements. Should the policy be revised during the grant term, a copy of the revised policy must be submitted to the City within thirty (30) days of being revised.

Section 4

Identify all officers, employees, contractors, subgrantees or other persons providing any type of service in relation to the proposed grant activity, in the following format. Use additional page(s) as necessary.

Name (Individual or Entity)	Association	Service Provided	Value of Service (\$)	Amount of City Funds Supporting Service (\$)	Mark “X” if individual or entity has had any grant, contract, or agreement with a federal, state or local agency terminated within the last 3 years.*

*If yes, please identify the grant, contract, or agreement including parties, term, and cause of termination on an additional page.

Section 5

This form is hereby completed on behalf of the applicant named above. Through the undersigned individual, the applicant hereby certifies that the completed form is true and accurate. The applicant acknowledges that it has read, understands, and agrees to comply with, the requirements of *City of Somerville Code of Ordinances Chapter 15*.

During the term of any grant, grantees have a continuing obligation to submit an updated Disclosure Form to the City of Somerville immediately as to any circumstances which constitute a potential or actual conflict of interest.

Signature:

Print Name of Authorized Individual:

Title:

Date: