

**Town of Cumberland**  
**Tuttle Road Moderate Income, Multi-Generational Neighborhood**  
**Public-Private Partnership Initiative**  
**Request for Qualifications**  
**August 21, 2017**

The Town of Cumberland (hereinafter referred to as “the Town”) is soliciting submittals for the development of a 31.67 acre parcel of town-owned land located off of Tuttle Road in Cumberland Center. This parcel is identified as Assessor’s Map R3, Lot 53 and consists of undeveloped land with a mix of both field and wooded land cover, further described later in this Request for Qualifications (RFQ).

The Town’s goals for this parcel are to facilitate the creation of a new residential neighborhood that offers housing, community space, and a compact, walkable and livable environment for a range of age groups and incomes. The property abuts the Town Forest, Town Hall, library and is in close proximity to the schools, ballfields and the heart of Cumberland Center. The Town’s Comprehensive Plan highlights the community’s goals for this initiative, and emphasizes the need for housing that is affordable to moderate income households who are seeking smaller dwellings, a range of housing types, and a compact and multi-generational neighborhood environment.

The development’s design should be appealing and affordable to a wide range of households, from families with school-aged children to seniors seeking both independent living as well as assisted care. To achieve these objectives, the Town is seeking a Developer with the experience, technical capacity, financial capacity, initiative, and creativity to work collaboratively with the Town on designing, permitting, and implementing such a neighborhood. The remainder of this RFQ outlines the details of the desired development elements and program, the zoning and public process, the moderate-income goals, the utilities and characteristics of the parcel, the partnership elements, as well as the qualification criteria and submission process. The Town will conduct a pre-proposal conference where additional information will be presented and there will be an opportunity for questions and answers.

**A. DESIRED DEVELOPMENT ELEMENTS AND DESIGN**

- Compact residential neighborhood design that is conducive to both family housing and senior / 55 and older households;
- Desired dwelling unit total of 75 to 100-units with a mix of 1, 2 and 3-bedroom units;
- A mix of housing types with single-family and two-family units with garages / covered parking. Townhouses and other multi-family building styles will be considered, but must be in scale and character with Cumberland Center and comply with the Town’s Design Guidelines;
- The development shall include a dedicated space (or development pad) for a 50+/- bed Senior Assisted Living Facility (approximately 15,000 SF of footprint)

that is expected to warrant a 1 to 1.5-acre area. This component of the development plan is not expected or required to be delivered by the developer, but can be part of the initial phases of the project if the development team has the capacity;

- The development should consider including space for a 10,000 to 15,000 SF Multi-Generational Recreation/Community Building and associated parking for use by neighborhood residents as well as the larger community (1 +/- acre area). This desired facility may be delivered through a partnership with the Town and can occur on-site or in a nearby Town-owned off-site location;
- A compact, walkable, and interconnected neighborhood with focal points, such as the Recreation/Community Building, common green space, pocket parks, etc;
- Integration with, and pedestrian connections to, the abutting Town Forest, Town Hall, the Drowne Road ballfields, the planned sidewalks along Tuttle Road and connections to other Cumberland Center activity areas.

## **B. MODERATE INCOME AFFORDABILITY REQUIREMENTS**

- Dwelling units within this neighborhood are expected to be affordable to moderate income households with incomes ranging between 80% to 100% (or less) than the most recently published Portland, Maine, MSA Median Family Income adjusted for family size and consistent with the income thresholds published by the U.S. Department of Housing and Urban Development for the greater Portland region. The specific mix of units within the 80% to 100% affordability range will be determined as the project's development program evolves.
- The 2017 Portland MSA Median Family Income is currently \$83,400 and therefore dwelling units within this project should be structured to be affordable to family incomes ranging from \$66,720 to \$83,400 or less.
- The development will be required to provide only rental units (not homeownership) and compliance with the income thresholds will be required to be verified annually.
- To demonstrate and maintain affordability, the lease/rental rate and basic utility, energy and other housing costs should not exceed 30% of the household's gross monthly income. As noted above, the qualified household gross income for renter occupied housing shall be a mix of 80% to 100% or less of the most recently published Portland MSA Median Family Income.

## **C. LOCAL ACCOMODATIONS**

In addition to providing for moderate income housing that is affordable to a range of age groups, this initiative is also aimed at providing for some unmet housing needs and opportunities for Town residents and their families. Currently, there are households in the community that may be seeking to downsize and/or transition from a traditional single-family home to a smaller dwelling that may be a duplex, townhouse-style, or more retirement community-oriented in

design and setting, while staying within the community. Alternatively, younger individuals, families or households who may have grown up in Cumberland are seeking moderate income dwellings to reside in as they start careers and become settled. Given this goal and desire, the Town seeks a development partner that will work with the community to establish a marketing and rental program that prioritizes the attraction of local residents to help achieve these goals, while maintaining a fair housing policy and accommodating a wide range of residents.

#### **D. ZONING PROCESS AND PUBLIC CHARRETTE**

Given the desired development design, unit count, mix of dwelling unit types, and multi-generational households, the current base Rural Residential zone and the Senior Housing Community Overlay District will not enable the full vision for this initiative. To this end, the Town will help facilitate a two-step zoning and public charrette process to customize the zoning for the project's needs.

Following the Qualification based selection of the Developer (see subsection I.), the first step in the zoning process will be to conduct a public input, charrette process that will involve the selected Developer, the Town Council, Planning Board, Town officials, and community members. The goal of the charrette is to enable the developer to present their initial conceptual development design, plans and program, and to facilitate a public discussion on the design and elements of the project. This early public input and visioning process can enable the selected Developer's concept plans and development program to be discussed and refined prior to the more formal zoning process.

Following the public charrette process, and with input on the development concepts, the second step in this process will be to work collaboratively with the Town Council and town officials on a Contract Zone for this project. Given the nature of this initiative, a Contract Zone can be customized for this project and enable the development design elements, permitted uses, and land use standards that are agreed to with the selected Developer as well as the inclusion of the public-private partnership details that will likely be instrumental to delivering the project. The cost and responsibility of crafting a suitable Contract Zone Agreement will be the responsibility of the Town, but in close collaboration with the selected development team.

#### **E. PUBLIC UTILITIES, ACCESS AND SITE FEATURES**

This 31.67 acre site is located 1,400 feet off of Tuttle Road and is accessed by an unimproved logging/farm road. Development access is expected along this unimproved road alignment. The majority of the site exhibits a fairly level grade with two large field areas. The easterly side of the property is wooded along the property's edge with the existing rail line. Based on our preliminary data, the majority of the site is buildable uplands with a few wetland pockets identified. A current wetland delineation has been performed and is included as an exhibit.

Public water, sewer, power, cable, telephone and natural gas currently exist within the Tuttle Road right-of-way and have sufficient capacity to serve new development on this site. As noted in other sections, this site abuts the Town Forest that has an extensive trail system and can provide pedestrian connections to Town Hall, community ballfields, schools, library, adjacent

neighborhoods as well as other destinations within Cumberland Center and vis versa. Further, a sidewalk will be constructed along Tuttle Road this Fall (2017) that also can provide pedestrian access to and from this site.

#### **F. PUBLIC-PRIVATE PARTNERSHIP**

The Town is seeking a collaborative, public-private partnership with a selected Developer to deliver this moderate income, multi-generational, mixed housing neighborhood as outlined in this RFQ. Following the selection process and as part of the project planning, the Town and the Developer will negotiate the details of the public-private partnership, which may include, but are not limited to:

- Removing or limiting the land costs for the Developer to enable the delivery of moderate income units and the desired design and amenities;
- Partnering with the Developer on the cost and installation of the infrastructure for the project that will ultimately be public, such as roadways, drainage and similar infrastructure and utilities;
- Partnering or funding the construction of the potential Recreation/Community Building component of the project, whether on or off-site;
- Managing and funding the Contract Zoning Agreement and process for this project;
- Consideration will be given to a Tax Increment Financing Agreement (TIF) to facilitate extraordinary aspects of the project, such as the Assisted Living Facility and/or an Affordable Housing Tax Increment Financing Agreement (AHTIF).

#### **G. ADDITIONAL AVAILABLE INFORMATION**

The materials provided as exhibits with this RFQ include the following:

- Exhibit 1: Map of the parcel, including topography, location of utilities, and property boundaries
- Exhibit 2: Senior Housing Community Overlay District regulations and Development Design Standards
- Exhibit 3: Aerial Map of the Parcel and Surrounds
- Exhibit 4: Available Wetland and Natural Resource Mapping
- Exhibit 5: Photographs

These exhibits are provided for your use in preparing a proposal. While this material should be considered reliable, much of it is preliminary in nature and the Town does not warranty this information. Prospective Developers should consider utilizing private consultants to verify site conditions.

#### **H. PROPOSAL REQUIREMENTS**

The following material shall be provided in all proposal submissions:

- **Detailed Project Description** – The submission should include a description of the development design, program, housing types, sizes, bedrooms, unit totals, moderate income affordability details and other elements that meet or exceed the desired development elements and design as well as the affordability requirements outlined under both sections A and B.
- **Conceptual Site Plan** – A conceptual site plan shall be provided that shows the development layout, buildings, parking areas, vehicular and pedestrian ways and circulation patterns, open space, common areas, buffers, and connections to the surrounding area.
- **Conceptual Building Elevations** – Conceptual, sample building elevations or perspectives shall be provided to portray general architectural styles, themes and relationships.
- **Development Team** – The submission shall include the identification of the entities that will be involved in the initiative and a description of the roles of each entity (such as developer, engineer, architect, property manager etc.). Further, a summary of the development team’s past experience with similar projects shall be provided that demonstrate the applicant’s experience, capacity and competency in executing such a project.
- **Preliminary Pro Forma** – A preliminary pro forma and statement of financial capacity showing the applicant’s ability to execute the project as conceptually proposed. In addition, this section should demonstrate the Developer’s ability to meet the affordability expectations.
- **Public Assistance** – A general explanation of the Town/public assistance that will be required to support this development and the moderate-income housing goals desired that are consistent with, and if necessary in addition to, the potential public-private partnership opportunities listed in subsection F.
- **Preliminary Schedule** – A preliminary schedule for the development process shall be provided that outlines the design, zoning, permitting, financing, construction, phasing, and occupancy timeframe planned by the applicant.

## I. QUALIFICATIONS

The Town of Cumberland will use the following criteria in reviewing and scoring the submissions in order to select a development partner for this initiative:

- The financial capacity of the development team;
- The technical abilities of the development team;
- The development project’s conformance in meeting or exceeding the desired development elements and design summarized under subsection A.
- The development project’s ability to meet or exceed the moderate-income affordability requirements highlighted under subsection B.
- The market feasibility of the proposal; and
- The anticipated level of financial partnership assistance needed to execute the proposal

## **J. SUBMISSION PROCEDURE**

Submissions shall be provided in sealed envelopes by the time and date specified below. The proposal opening and evaluation process for this project will not be open to the public. The Town will review the submissions and may request presentations in person. The Town may select a single Developer, or multiple Developers, with whom to initiate additional negotiations and reserve the right to negotiate terms and conditions that may result in modifications of any or all parts of a proposal. The Town's final determination will not be made public until such time as the negotiated transaction has been presented to and approved by the Cumberland Town Council.

## **K. REAL ESTATE BROKER PARTICIPATION**

Although Brokers are encouraged to work with prospective clients to inform them of this opportunity, the Town will not compensate Brokers for their work. Accordingly, Brokers should arrange for compensation arrangements from their respective clients. Brokers will also be required to provide the Town with a copy of their client agreement to become involved in the selection process.

## **L. ENVIRONMENTAL CONDITION**

The Town is not aware of any hazardous environmental conditions on the subject property, but has not taken steps to verify the presence or absence of hazardous materials. Parties responding to the RFQ are responsible for verifying the environmental condition of the subject property.

## **M. PRE-PROPOSAL CONFERENCE**

A pre-proposal conference is scheduled for Thursday, September 7, 2017 at 9:00 a.m. in the Town Council Chambers at Cumberland Town Hall located at 290 Tuttle Road, Cumberland, Maine. A site walk will follow this conference. **All prospective development teams are strongly encouraged to attend.**

Questions regarding this RFQ must be directed to Carla Nixon, Director of Planning and Development at the Cumberland Planning Office via e-mail at [cnixon@cumberlandmaine.com](mailto:cnixon@cumberlandmaine.com); all questions and answers will be shared with the same applicants.

The written Request for Qualifications document supersedes any verbal or written prior communication between parties.

## **N. PROPOSAL SUBMISSION AND DUE DATE**

Submissions in a sealed package marked on the outside with the title: Tuttle Road Moderate Income Multi-Generational Neighborhood Initiative and the name of the Development Team.

Proposals are legal and binding upon the bidder when submitted. One unbound original, three copies, and an electronic version must be submitted.

Submissions will be received until 5:00 PM, EST on Wednesday, September 27, 2017 at the Town Manager's Office at Cumberland Town Hall located at 290 Tuttle Road, Cumberland, ME 04021. Any submission received after this date and time will not be accepted.

The Town of Cumberland reserves the right to reject any or all Proposals, to negotiate changes in the scope of work and other RFQ requirements, to waive technicalities and informalities, and to make an award deemed in its best interest.

The Town anticipates that the selection of the developer will be by October 5, 2017.

Should the Town be unable to negotiate an agreement with a selected Developer to sufficiently meet the goals and objectives for the project, the Town reserves the right to terminate that selection and consider other Development Teams to partner with.