



## **TOWN OF CONCORD, MASSACHUSETTS**

### **REQUEST FOR PROPOSAL #361 FOR A COMPREHENSIVE LONG RANGE PLAN and RELATED TECHNICAL SUPPORT SERVICES**

**DUE: 2:00 P.M. ON THURSDAY, DECEMBER 15, 2016**

#### **I. Purpose and Context**

The Town of Concord, Massachusetts has appointed the Comprehensive Long Range Plan Committee to prepare a Comprehensive Long Range Plan (the Plan) for the community. The Plan is expected to be the basis for guidance, coordination and accountability to future decision makers regarding the long term land use and development of the community.

The Comprehensive Long Range Plan Committee is now seeking to partner with a firm or team of professionals who can bring to the project experience in all aspects of community planning, grassroots outreach, communication, community participation campaigns, polling, and opinion gathering and who will help the Town in building a comprehensive long range plan with sensitivity, skill, expertise, experience, and labor. The firm or team must have a thorough understanding of the structure and functions of local town government in Massachusetts, of the challenges town government faces, and of the fundamentals of municipal planning and land use regulations and law in Massachusetts. The firm or team must also demonstrate experience in helping communities with the setting of priorities of different (and sometimes conflicting) goals.

#### **II. Background information:**

Concord is a suburban community located 20 miles northwest of Boston in the heart of the high-tech corridors - twelve miles from 1-495 to the west and five miles from 1-95 (128) to the east. State and local routes 2, 2A, and 62 provide access through town. There are two MBTA train stops in Concord – Concord Center station on Thoreau Street and West Concord Depot on Commonwealth Ave., which provide commuter service to Boston, Cambridge, Waltham to the east and Fitchburg and other communities to the west. Concord offers a full range of services to its residents and businesses, including an active town government, first class

libraries, a nationally accredited police department, a full-time fire department, and local and regional school systems that are ranked among the top in the state.

Concord and the surrounding area have the 5th largest per capita income in the U.S. Concord's highly educated workforce contributes to leading-edge companies in high-tech, financial services, and biotechnology located in Concord and the greater Boston region. Commerce and industry in Concord includes a wide range of retail stores and services, traditional manufacturing, high tech industry, and financial services.

Concord's 17,000+ residents value its history, schools, libraries, recreation programs, open spaces, village centers, and neighborhoods.

### **III. Scope of Services**

This planning effort is envisioned as an opportunity to engage the community in an open, public process to define Concord's future. It shall result in a graphic plan for the community that includes strategies for implementation such as suggested zoning bylaw revisions, design guidelines, improvements to public ways, expanded transit opportunities, etc. The Comprehensive Long Range Plan cannot be a wish list. The Consultant will assist the Town and the Comprehensive Long Range Plan Committee with the assembly of realistic and actionable recommendations and initiatives; in setting sensible priorities that are responsive to citizens' input; and in devising an implementation plan with workable and responsible time lines. For purposes of this RFP, the following scope of services is anticipated:

- A. Data gathering: The CCLRP Committee will be responsible for gathering information and data from existing Town boards and committees; Town Planning staff shall be responsible for gathering information from other town agencies, State agencies and Census data. The Consultant shall work with the Committee and Planning staff to identify additional ways to gather primary data from Town residents and business owners such as through direct interviews with key Town staff and residents (up to 15), survey (on-line and/or mail), workshops (3-4), focus groups (5-6), etc. The Consultant shall compile the data, along with observations and findings, into an easy to understand format that is shared with the Committee.
- B. Analysis: As data is gathered from multiple sources, the Consultant shall review the information and provide insight, observations and findings, working with the Committee to integrate input and questions from the Committee and testing potential responses and action-items that are identified. Analysis shall include identifying necessary shifts in scope and focus of public services and facilities to meet anticipated future needs and demands of changing demographics; estimating future manpower, resources, and/or funding to best deliver needed services; and exploring ways and opportunities for improved level of services.
- C. Output/the Plan: Based on public input and the review by the Committee, develop the Plan that incorporates the best of the Guidance Documents identified below, including final observations, findings and recommendations as well as an Implementation element with prioritized recommendations as defined above. Deliverables shall be provided in digital

format (pdf and Microsoft 'Word') and one hard copy and should include formats (PowerPoint) suitable for public presentations.

- D. Communications/Outreach: Public involvement in the exploration and definition of a vision for the community and public support for goals and objectives will be essential to the Plan's acceptance and implementation. The Consultant shall work with the Committee to help design an "authentic participation process", which engages residents who may not typically participate in Town affairs. Outreach is an opportunity for education, which will empower Concord's citizens to provide informed and relevant input into the final recommendations of the Plan. The Consultant and the Committee will work together to offer public forums, workshops, editorials to the local paper and web-page, along with other forms of outreach where information will be presented and consensus and understanding facilitated.

The Comprehensive Long Range Plan Committee will be the steering committee for the Plan and will provide operational input and policy direction. Regular meetings with the steering committee should be budgeted.

The Comprehensive Long Range Plan is funded through two Concord Town Meeting appropriations. Overall funds available for the Comprehensive Long Range Plan are approximately \$120,000. The Town reserves the right during the selection process and when negotiating a final scope and contract with the selected consultant to discuss the costs of various project components and recommended priorities, and to modify the proposed scope of services for instance by shifting emphasis, or by deleting items.

#### **IV. Guidance documents**

Keep in mind the following guidance documents in preparing the Plan:

1. The Plan must be consistent with M.G.L. Ch. 41, s. 81-D and cover the standard master plan elements set forth therein (i.e., Land Use, Housing, Economic Development, Natural and Cultural Resources, Open Space and Recreation, Facilities and Services, Circulation and Transportation, and Implementation). Each of the standard elements shall include a regional perspective so far as applicable. For instance, the inventory analysis for:
  - The housing element should look at Concord's housing needs in the context of the regional housing needs (reference the 2015 Housing Production Plan);
  - The economic development element should include a regional economic assessment of trends and factors that influence business growth, location, and relocation decisions with an evaluation of Concord's competitive position to attract new business growth;
  - The open space and recreation element should include a view on regional open space resources and evaluate how Concord's open lands fit in (reference the 2015 Open Space & Recreation Plan):
2. The Plan must integrate the Town's adopted sustainability principles by holistically problem solving, blending the best scientific understanding of existing conditions and available technologies with the public's resolve to act (i.e., (1) Reduce dependence upon fossil fuels,

underground metals, and minerals; 2) Reduce dependence upon synthetic chemicals and other manufactured substances; 3) Reduce encroachment upon nature; and 4) Meet human needs fairly and efficiently in a framework that promotes collaboration and coordination). The Plan will address the community's 'resilience', that ability to respond to and recover from potential disruptive events (i.e., ice storms, flooding, economic downturn), as well as the community's commitment to 'sustainability' or preserving resources and opportunities that currently exist for future generations.

3. The Plan should integrate the framework and organizing principles as identified by the American Planning Association's Sustaining Places Initiative (APA PAS Report 578 *Sustaining Places: Best Practices For Comprehensive Plan*"; January 2015). The comprehensive plan standards as defined in the APA initiative are organized into a framework of related components: a) six principles; b) two processes; and, c) two attributes. Each component is implemented through a set of best practices. Collectively, these principles, processes, attributes and supporting best practices define what the comprehensive plan for sustaining places should do.
4. The Plan must contain an Implementation element that defines actions to carry out the proposals of the Plan over time. The Implementation element ties the defined actions to timetables, activities, budgets and agencies.

## **V. Timeline:**

Consultant Interviews - week of January 9, 2017

Select Consultant – week of January 16, 2017

Negotiate and Sign Contract – week of February 6, 2017

### **Sixteen month Schedule: February 2017 – May 2018**

Data Gathering (four months) – February 13, 2017 – May 12, 2017

Four Monthly meetings with Committee for data reports

Fifteen Key interviews with Stakeholders (these may be split between Data Gathering and Analysis phases at Consultant's recommendation)

Six Focus Groups with Town Departments in March 2017

Public Workshop – week of May 15, 2017

Analysis (six months) – May 15, 2017 – November 3, 2017

Six Monthly meetings with Committee to present analysis scenarios

Public Workshop – week of November 13, 2017

Output / The Plan (three months) – November 20, 2017 – February 23, 2018

Three Monthly meetings with Committee to Design Actionable Implementation Plan

Final Draft: week of March 5, 2018

Final Public Presentation: week of May 7, 2018

Final Plan: week of May 21, 2018

## **VI. Project deliverables shall include:**

- A. A communication and outreach program for 'Authentic Participation' – A program to encourage public participation and generate a sense of ownership of the plan's vision, recommended actions and initiatives through workshops, survey or polls, engaging conversation, electronic media and other creative initiatives. Survey and/or polls should focus on testing specific recommended actions and initiatives formulated in this planning process; they must be organized, structured, analyzed, and compiled to provide report results with high statistical significance.
- B. A Comprehensive Long Range Plan with appendices - The final Plan will be a well-organized and succinct document with executive summary and a captivating display summary for use in various venues and events. The document should be easily read and understood by all decision makers and the general citizenry in the Town. It will contain - in appendices - detailed findings, statistical data, analysis and evaluation of survey responses or poll results, a description of the planning process, meeting notes, and back-up for prioritized recommended actions and initiatives. The Plan shall contain a consistent set of visions, goals, policies, objectives and actions that are based on evidence about community conditions, major issues and impacts. The final product from the Consultant shall also include a web-enabled (searchable) document.
- C. Accountable Implementation – Prioritized recommended actions and initiatives for carrying out the Plan shall be clearly stated and responsible parties identified, along with metrics for evaluating progress in achieving desired outcomes. The Plan shall include creative and innovative strategies and recommendations that are coordinated internally with each other; vertically with state and federal requirements; and, horizontally with plans of adjacent communities to the extent possible.

The Plan should provide reasonably reliable guidance and predictability for future legislative and appropriation votes by the Town that will mark future plan implementation.

**Pre-Submittal Questions:** All questions shall be submitted in writing to the Town by 4:00 p.m. on Wednesday, November 30, 2016 to DPLM Director Marcia Rasmussen at [mrasnussen@concordma.gov](mailto:mrasnussen@concordma.gov). The Town will prepare a response to questions and issue an addendum as needed containing said responses. Any answers are intended solely as a clarification to the RFP, and will not constitute an amendment or modification to the RFP unless expressly stated as such. The answers to submitted questions and, if issued, an addendum shall be sent to each potential respondent who has obtained the RFP (and provided their email address) by 4:00 p.m. on Monday, December 5, 2016.

## **VII. Proposal Submission Requirements and Deadline**

- A. Letter of Transmittal – A letter of transmittal shall be signed by the individual authorized to negotiate for and contractually bind the proposer. The letter must state that the offer is effective for at least sixty (60) days from the submission of proposal or until it is formally

withdrawn, or a contract is executed, or this RFP is cancelled. The proposal shall also disclose any potential conflict of interest.

- B. Qualifications – Describe the consultant’s team and the proposer’s ability to successfully undertake the project technically, financially, and managerially. Include descriptions of similar work conducted elsewhere. Indicate how the members have worked together on previous engagements.
- C. Methodology – Clearly describe the general work plan and methodology the consultant will use to fulfill the scope of services. Include the public outreach techniques to be utilized to engage the community.
- D. Staffing – Describe the consultant’s team with the roles and responsibilities of each member identified. Include capabilities of the proposed firm or individuals. Provide resumes and highlight staff members’ who will be directly involved in the project. Include experience in preparing Comprehensive Plans, workshop facilitation, consensus building and preparing regulations.
- E. Project Timetable – The goal is to complete the Comprehensive Long Range Plan within 16 months of date of award. The proposer may recommend an alternative timetable that would increase the effectiveness of the planning effort. If that is the case, provide a timetable reflecting the timing of the workshops, deliverables and other significant milestones in completion of the project.
- F. Budget – Include a breakdown of itemized costs for each of the tasks as outlined in your work plan on a fixed fee basis. The budget shall delineate the cost for each of the following:
  - a) Personnel – Provide hourly rate for each individual who will work on the project.
  - b) Deliverables – as outlined in your work plan.
  - c) Travel Cost – if any
  - d) Administrative costs – copies of reports, photographs, presentation boards, etc.
- G. References – The municipality/firm name, contact person, telephone number and work description of all the projects for which the proposer has performed services similar to those described in the scope of work in the last five years.
- H. Submission Deadline – **Consultants must submit one (1) original unbound single-sided copy and five (5) double-sided bound copies of the technical (non-price) proposal and one (1) copy of the price proposal by 2:00 P.M. EST on Thursday, December 15, 2016** to the attention of: Director Marcia Rasmussen, Department of Planning & Land Management, 141 Keyes Road, Concord, MA 01742. **Proposals that are faxed or late will not be accepted.**

The main envelope shall be clearly marked PROPOSAL – Comprehensive Long Range Plan Consultant with CONSULTANT NAME: \_\_\_\_\_

Included in the main envelope shall be a sealed envelope containing 1 original and 5 copies each of the technical (non-price) proposal, which is clearly marked TECHNICAL PROPOSAL

– Comprehensive Long Range Plan with CONSULTANT NAME: \_\_\_\_\_ on the cover. This envelope shall include all the requested material (including the Certification of Non-collusion and the Certification of Tax Compliance) **with the exception** of the Price Proposal Sheet and any associated price proposal documents.

Also included in the main envelope shall be a sealed price proposal envelope that is clearly marked: "PRICE PROPOSAL – Comprehensive Long Range Plan with CONSULTANT NAME: \_\_\_\_\_ on the cover. This envelope shall contain 1 copy of the price proposal sheet and any associated price proposal documents.

### **VIII. Evaluation Criteria**

Each proposal will be evaluated on:

1. Number of years the proposer has been in operation,
2. Professional qualifications of staff who will work on the project (please include resumes of the project staff),
3. Experience in projects of similar size and scope,
4. Demonstrated experience in helping communities with the setting of priorities of different (and sometimes conflicting) goals,
5. Ability to complete previous project on budget and on time,
6. Commitment to complete this project in the specified time frame by providing information on your current work load,
7. Quality of proposal,
8. Knowledge and thorough understanding of the structure and functions of local town government in Massachusetts, of the challenges town government faces, and of the fundamentals of municipal planning and land use regulations and law in Massachusetts as evidenced by submittal of prior work.
9. References (which should be from individuals, firms, and government entities that have hired the proposer for projects with a similar size and scope as this project, conducted during the last five years). Reference information should include contact name, title, and phone number, as well as the project name, organization for whom project was done, and project completion date,
10. Examples of prior work for other municipalities (can be submitted on CD, thumb drive, FTP site or the like, as long as submitted electronically).
11. Proposed schedule and approach to working with the Committee that clearly demonstrates how the Comprehensive Long Range Plan will be developed, and,
12. Presentation of the proposal to Town staff, if requested to do so.

### **IX. Rule for Award**

The Town of Concord will determine the most advantageous proposal from a responsible and responsive vendor by taking into consideration price and all of evaluation criteria set forth in the RFP. The proposals will be ranked in terms of their responses to the evaluation criteria. Then, the price proposal envelopes will be opened and the proposals will be judged by taking into consideration price and response to the evaluation criteria (the evaluation criteria are

discussed in V. Evaluation Criteria). Based on qualifications and references, firms may be asked to present their proposal to Town staff.

The Town will select the responsive and responsible proposer submitting the most advantageous proposal taking into account the evaluation criteria as well as the price proposal.

At its sole discretion, the Town will decide whether to accept the Bid. In these matters, the judgment of the Town will be binding, conclusive, and final.

Contract award will be made within sixty (60) calendar days after the date for receiving proposals. Proposals may not be withdrawn within that time except as provided by M.G.L. Ch. 30B.

**X. Town’s Right to Reject Proposals**

The Town reserves the right to reject any or all proposals if it is in the Town’s interest to do so.

The Town may consider informal any proposal not prepared and submitted in accordance with the provisions hereof and may waive any informality or reject any and all bids, should the Town deem it to be in the Town’s interest.

The Town may also reject proposals which in its sole judgment are incomplete, conditional, obscure, or not responsive or which contain additions not called for, erasures not properly initialed, or alterations or similar irregularities, or the Town may waive such omissions, conditions or irregularities, if considered minor.

**CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under penalties of perjury that this proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

The undersigned, by submittal of this Proposal, agrees, should the undersigned become the successful proposer, to all of the terms of the RFP specifications and accepts these terms as incorporated in a contract with the Town.

\_\_\_\_\_  
Name of person signing proposal

\_\_\_\_\_  
Title

\_\_\_\_\_  
Name of business

Business Address: \_\_\_\_\_

City and State: \_\_\_\_\_

Telephone No: \_\_\_\_\_ Fax No: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
Signature

**CERTIFICATION OF TAX COMPLIANCE**

I certify, under the penalties of perjury, that the below mentioned firm or person, to my best knowledge and belief, has complied with all the laws of the Commonwealth relating to taxes.

NAME/FIRM: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ DATE: \_\_\_\_\_

SIGNATURE OF AUTHORIZED OFFICIAL: \_\_\_\_\_

TITLE: \_\_\_\_\_

SOCIAL SECURITY or FEDERAL IDENTIFICATION #: \_\_\_\_\_

Approval of a contract, or other agreement, will not be granted unless the applicant signs this certification form.

Your Social Security number or Federal Identification number will be furnished to the Massachusetts Department of Revenue (DOR) to determine whether you have met tax filing or tax payment obligations. The Town is required to furnish a list to the DOR at the end of its fiscal year, showing the vendors to whom more than \$5,000 is paid during the 12 months, ending June 30. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended. This request is made under the authority of Massachusetts General Laws, Chapter 62C, Section 49a.

## **PRICE PROPOSAL FORM**

**Data gathering** (Part 1):

State the Proposal Price for Part 1 in numbers \_\_\_\_\_

State the Proposal Price for Part 1 in words:

\_\_\_\_\_

**Analysis** (Part 2):

State the Proposal Price for Part 2 in numbers: \_\_\_\_\_

State the Proposal Price for Part 2 in words:

\_\_\_\_\_

**Output/the Plan** (Part 3):

State the Proposal Price for Part 3 in numbers: \_\_\_\_\_

State the Proposal Price for Part 3 in words:

\_\_\_\_\_

**Communications/Outreach** (Part 4):

State the Proposal Price for Part 4 in numbers: \_\_\_\_\_

State the Proposal Price for Part 4 in words:

\_\_\_\_\_

Include a breakdown of itemized costs for each of the tasks as outlined in your work plan on a fixed fee basis. The budget should also delineate the cost for each of the following:

- Personnel – provide hourly rate for each individual who will work on the project.
- Deliverables – as outlined in your work plan.
- Travel Cost – if any.
- Administrative costs – copies of reports, photographs, presentation boards, etc.

NAME/FIRM: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE: \_\_\_\_\_ DATE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

SIGNATURE OF AUTHORIZED OFFICIAL: \_\_\_\_\_

TITLE: \_\_\_\_\_