



TOWN OF BOLTON

Planning Department

Town Hall, 663 Main Street, Bolton, MA 01740
Phone: 978-779-3308 Fax: 978-779-5461

March 24, 2022
Request for Proposals
Consulting Services
--
For Master Plan Creation

Due Date: April 25, 2022

Due Time: 1:30 p.m.

Table of Contents

Legal Notice.....	3
Notice of Request for Proposals.....	4
Section I: RFP Process Timeline	5
Section II: General Information & Proposal Submission Requirements	6
Section III: Project Overview, Scope of Work, & Deliverables	8
Section IV: Proposal Preparation, Evaluation, & Selection.....	18
Section V: Award and Contract	20
Section VI: Contact Information.....	21
Section VIII: Required Forms.....	22

Town of Bolton
Legal Notice

The Town of Bolton is seeking qualified consultants to prepare a comprehensive Master Plan. A full proposal package with specifications will be available March 24, 2022 at 1:00 PM in the Bolton Planning Department, online at <https://www.townofbolton.com/home/pages/bids-proposals>, or via email to Valerie Oorthuys at townplanner@townofbolton.com.

Questions must be submitted in writing to Valerie Oorthuys via email at townplanner@townofbolton.com. All proposals are due to the Planning Department by Monday, April 25, 2022 at 1:30 PM.

Any contract issued in response to a successful proposal must be approved by the Planning Board and the Town Administrator as Chief Procurement Officer. The Town reserves the right to reject any or all proposals if deemed to be in the best interest of the Town.

Notice of Request for Proposals

Description: The Town of Bolton invites Qualified Proposers to submit proposals to prepare and complete a comprehensive Master Plan. The full Scope of Work is attached here in Section III.

RFP Packages: RFP Packages will be available beginning **March 24, 2022 at 1:00 PM**. Packages are available via email by contacting Valerie Oorthuys at townplanner@townofbolton.com. Packages are also available for download at <https://www.townofbolton.com/home/pages/bids-proposals> or for pick-up at the following address:

**Town Clerk
Bolton Town Hall
663 Main Street
Bolton, MA 01740**

Monday, Wednesday, Thursday 9:00 am- 2:30pm, Tuesday 9:00 am – 4:00pm

Due Date & Time: Proposals are due by **1:30 PM on April 25, 2022**.

Place: RFPs are to be submitted to:

**Planning Department
Bolton Town Hall
663 Main Street
Bolton, MA 01740**

and in digital format to: townplanner@townofbolton.com

Pre-Proposal Conference: A pre-proposal conference will be held on Wednesday, April 13, 2022 at 10:00 AM via Zoom Video Communications, Inc. (Zoom) at <https://us02web.zoom.us/j/86570225598?pwd=VzQ2MkFSdnFJUeURjc2NaVUJjUT09> and accessed via phone at (929) 436-2866, with a Meeting ID of 865 7022 5598 and a passcode of 004017. The purpose of the conference is to assist prospective Proposers in the interpretation of the RFP, and other technical and contractual matters. This conference is not mandatory.

Questions/RFIs: If you have questions about this RFP or have a request for information or clarification, please contact Valerie Oorthuys via email at townplanner@townofbolton.com. All questions and requests for clarification must be received in writing by **12:00 PM on Friday, April 15, 2022**. It is anticipated that a compilation of all questions and responses will be distributed via email to prospective Proposers by **12:00 PM on April 19, 2022**.

Contract Info: The Town will provide a form of written contract to the successful proposer, to be approved by the Planning Board and the Town Administrator as Chief Procurement Officer.

Project Period: The Town intends to award a contract within sixty (60) days of the proposal opening and services under the contract will commence immediately upon execution of a written contract. Such services are expected to be completed within eighteen (18) months of the contract award. The Town, at its sole election, may extend this contract for a total term not to exceed three years. Please be advised that the Town is simultaneously trying to obtain grant funding for this project, and the timing of any grant award(s) may affect the project period and contracting timeline.

Section I: RFP Process Timeline

Thursday, March 24, 2022:	RFP available at 1:00 PM, RFP legal notice appears in Bids & Proposals on the Town of Bolton's webpage.
Wednesday, March 30, 2022:	RFP legal notice appears in the Bolton Independent (local newspaper)
Friday, April 15, 2022:	Last day to submit questions or requests for clarification. All questions must be submitted in writing via email to Valerie Oorthuys at townplanner@townofbolton.com by 12:00 PM.
Tuesday, April 19, 2022:	A compilation of all questions and responses will be distributed via email to prospective Proposers by 12:00 PM.
Monday, April 25, 2022:	Proposals due to the Planning Department by 1:30 PM.
April 25, 2022 to mid-May:	Evaluation Committee reviews and ranks proposals.
On or before June 1, 2022:	Notification of Award
Thursday, June 23, 2022:	First meeting with Master Plan Steering Committee

Section II: General Information and Proposal Submission Requirements

Below please find a description of the requirements and submissions that must be included as part of a proposal. Proposals must be sealed and marked as noted.

One (1) original bound copy and one (1) digital copy of the Proposal marked "Proposal - Consulting Services for Bolton Master Plan Creation" must be received per the time frame outlined in Section I. It is the sole responsibility of the Proposer to ensure that the Proposal arrives on time and at the designated place.

Within the technical portion and price portion of the proposal, please supply each of the following items and clearly structure and label the Proposal:

Non-Price/Technical Proposal

Each proposal must include a Non-Price/ Technical Proposal submittal, which shall be separately sealed and labeled as "Non-Price Proposal".

1. Cover letter with response, acknowledging addenda, if any, which includes a statement that the Proposal is in accordance with this Request for Proposal, and that the Proposer understands all sections and provisions therein. Any exceptions must be clearly stated.
2. A narrative describing the Proposer's understanding and approach toward completing the scope of work outlined in the Scope of Services as defined in this document, including overall methodology.
3. A Basic Scope of Services itemizing and detailing the tasks to be performed and deliverables associated with the Proposer's scope shall be provided.
4. A schedule of Services.
5. The identification of any and all sub-consultants and/or subcontractors who will work with the Proposer.
6. Certificates of insurance.

Price Proposal

The Price Proposal shall be separately sealed and labeled as "Price Proposal"

1. Consultant shall provide the Town with a lump sum fee.
2. Rates for individuals or positions. Ranges for positions are acceptable.

Required Forms

Quotes shall include completion of the following forms (attached to Request for Proposal):

1. Statement of Tax Compliance
2. Certificate of Non-Conflict of Interest
3. Certificate of Non-Collusion
4. Price Proposal

General Information

- Anyone who intends to submit a Proposal must contact the Town directly and specifically request a copy of this RFP, unless such company was sent a copy directly from the Town. The Town has responsibility for maintaining a control list of all potential Proposers;
- Failure to submit Price and Non-Price/Technical Proposals in separate sealed envelopes will result in rejection of the proposal;

- The contract is expected to be awarded within sixty (60) days of this proposal opening. This RFP as well as the successful Proposer's response will become part of the contract;
- If any changes are made to this RFP, an addendum will be distributed to all Proposers who have received the RFP through the Town of Bolton;
- A Proposer may correct, modify, or withdraw a proposal by written notice if received by the Town prior to the time and date set for the proposal opening. Proposal modifications must be submitted in a sealed envelope clearly labeled "modification No. _." Each modification must be numbered in sequence and must reference the original RFP. After the proposal opening, a Proposer may not change any provision of the proposal in a manner prejudicial to the interests of the Town or fair competition. Minor informalities may be waived or the Proposer will be allowed to correct them. If a mistake and the intended correct wording are clearly evident on the face of the proposal document, the mistake will be corrected to reflect the intended correct meaning and the Proposer will be notified in writing; the Proposer may not withdraw the proposal. A Proposer may withdraw a proposal if a mistake is clearly evident on the face of the proposal document, but the intended correct wording is not similarly evident;
- Proposal prices must remain firm for ninety (90) days after the proposal opening;
- All proposals must be signed by appropriate, authorized individual or individuals, e.g. if the Proposer is a partnership, by the name of the partnership, with the signature of each general partner. If the Proposer is a corporation, it must be signed by the authorized officer whose signature must be attested to by the Clerk/Secretary of the corporation and the corporate seal affixed, or appropriate certificate of authorization;
- Written addenda issued will be emailed to all parties that the Town of Bolton is aware have requested documents using the contact information provided to the Town. Absence of "failure" messages electronically transmitted from addressee's site will serve as confirmation of delivery of addenda. Proposers should contact Valerie Oorthuys via e-mail at townplanner@townofbolton.com or phone at 978-779-3308 if they believe an addendum has not been received;
- The Town of Bolton reserves the right to cancel all or part of this solicitation. The issuance of this solicitation does not imply any commitment to purchase any product or service from any Proposer. The Town reserves the right to reject all proposals and waive informalities;
- An Evaluation Committee comprised of the Chair and Vice Chair of the Master Plan Steering Committee, the Chair of the Planning Board, and the Town Planner will evaluate the proposals and recommend a Proposer for award by the Town of Bolton;
- Any contract issued in response to a successful proposal must be approved by the Town of Bolton Chief Procurement Officer. The Town reserves the right not to make an award on this contract if doing so is in the best interest of the Town.

Section III: Project Overview, Scope of Work, & Deliverables

The Town of Bolton seeks the submission of consultant proposals for technical assistance for the update of Bolton's Master Plan to guide equitable and sustainable development through the year 2040. In addition to the elements statutorily required by M.G.L. c.41, §81D, the Master Plan shall address:

- Increasing access to affordable housing and diverse housing options;
- Accelerating climate change adaptation and mitigation;
- Meeting the needs of an aging population;
- Planning for multi-modal transportation;
- Ensuring active support of underrepresented groups.

At this time, this project is funded through Town staff wages, volunteer labor, and technical assistance from MAPC. Voters will be requested to approve limited funding at the May 2022 Annual Town Meeting. Additional funds will be sought through grant opportunities.

Bolton's current Master Plan was finalized in August 2006 and had a 20-year time horizon. The consultant will work under the direction of the Town Planner and Master Plan Steering Committee Chair and Vice Chair. Bolton began the Master Plan process primarily with in-house staff, an eleven member Steering Committee, and an additional twelve volunteers assigned to specific task groups. Task groups were formed to focus on particular aspects of the Master Plan:

1. Climate Change & Action;
2. Cultural & Historic Resources;
3. Economic Development;
4. Housing;
5. Land Use;
6. Municipal Facilities & Services;
7. Open Space & Recreation;
8. Population, Demographics, & Development;
9. Public Outreach & Communication;
10. Schools;
11. Survey;
12. Town Finances & Impact on Taxes;
13. Transportation Improvements;
14. Water & Sewer

Further information regarding the Master Plan Steering Committee may be found at the Town of Bolton's website at www.townofbolton.com/master-plan-steering-committee.

Bolton's Master Plan must also incorporate a regional approach, which assesses each element in the Master Plan against any applicable regional plan to ensure consistency. The Town of Bolton is a member of the Metropolitan Area Planning Council (MAPC) and sits within the Minuteman Advisory Group on Inter-Local Coordination (MAGIC) subregion. Alignment with MAPC's comprehensive regional plan, MetroCommon 2050, is of great importance.

To date, the Steering Committee has completed the following items:

- Initial Town-Wide Survey, completed in June 2020;
- Development of Draft Vision Statement in December 2020;
- Analysis of Existing Conditions;
- First Public Forum, October 2021.

- The first public forum oriented residents to the Master Plan process, provided an overview of the existing conditions analysis, and included 9 interactive stations for residents to provide their vision and feedback.

Through their work to date, the Master Plan Steering Committee has identified the following key topics to be addressed through the Master Plan planning process itself and through the Master Plan's recommended implementation measures:

- The need to adopt a clear method of analyzing the highest and best use of parcels of land, whether parcels are currently under the stewardship of the Town, on offer through lease or sale agreements, eligible for the Chapter 61 Right of First Refusal process, or through other means;
- A concern for a lack of space within municipal buildings for Town offices and services to be appropriately housed and how this may impact future staffing needs and ability to provide community programs and services;
- The lack of public sewer and water service, particularly within Bolton's commercial districts, as this challenges future growth and economic development in Town;
- The need for a Public Engagement Plan to facilitate transparent decision-making;
- The need to assess the locations of commercial and industrial zoning to confirm whether they are suitable, need to be relocated, or need to be expanded;
- An overall approach to development that mindfully balances the historic, rural character of the Town with the need and desire for business growth and new housing options.

The Town recognizes the remaining work will include robust public engagement and drafts of portions of the plan may require multiple iterations prior to successful completion. Qualified consulting firms should have experience in all aspects of community planning: community visioning and goal setting, public engagement and outreach, communication and coordination, data collection and analysis, and implementation planning.

Timeline and Logistics

Tasks outlined in the below Scope of Work are anticipated to take approximately eighteen months from the initial date of contract. The final plan is anticipated to be adopted by Annual Town Meeting in May 2024. As part of the submission, the consultant will submit a detailed project timeline with key target dates and estimated duration of tasks. Variations from the Town's proposed timeline should be discussed in the submitted proposal. Due to the Town's expectations for extensive public engagement and outreach, evening and/or weekend meetings and forums will be required, with the understanding that due to the ongoing COVID-19 pandemic these meetings and forums may occur online. The consultant must provide own car, cell phone, printer, and computer with appropriate protections, software, and high-speed internet access.

Consultant Expenses

All expenses shall be incorporated within the consultant's submitted quote. No separate reimbursements will be made for other business or travel expenses, such as office supplies, meals, transportation, postage, printing, or delivery fees.

Background

The Town of Bolton is at a pivotal moment in guiding land use decisions to balance commercial and residential growth with the preservation of open space and climate change mitigation. As development pressures intensify, the Town will need to clearly direct growth to areas of Town which could provide multi-modal access, New England village style density, and a vibrant marriage of economic development and multi-family development. Through recent planning processes in partnership with the Municipal Vulnerability Preparedness program, Bolton has a clear picture of the ecological value of our landscape. In turn, the Master Plan must synthesize what we've learned about opportunities for climate mitigation and

resiliency and apply it to land use, transportation, housing, and future growth scenarios. The Master Plan must use a sustainability lens throughout all plan components.

The Town of Bolton is located within Worcester County with a population of approximately 5,665 as of the 2020 Census. Bolton is located 10 miles northeast of Worcester and 30 miles west of Boston. The Town is bordered by Harvard, Stow, Hudson, Berlin, Clinton, and Lancaster. The Town is bisected by Route 117, a state numbered road, providing a west- east connection, and Interstate 495, a north-south connector toward the middle of Town. The vast majority of land in Bolton is zoned residential, with commercial and industrial zoned parcels distributed along a 3.5 mile stretch of Route 117. Bolton is an attractive rural community, and hosts numerous farms and orchards that brings the Town consistent seasonal tourism. The Town of Bolton is a designated Green Community and a Housing Choice Community.

Bolton has strong fiscal management and operates with a balanced budget, but a persistent challenge is the Town's reliance on residential taxation as its main source of revenue. Bolton is within the Nashoba Regional School System and has one elementary school, one middle school, and hosts the regional high school.

Bolton has 69 subsidized housing units, a total of 3.99% of its housing stock. A 229-unit rental development is currently pursuing a Comprehensive Permit through the Zoning Board of Appeals, which would bring the Town above the 10% minimum SHI threshold.

The following documents to be referenced in preparing work for the Master Plan process include, but are not limited to:

- Bolton Master Plan (2006)
- Sustainable Village Center Study (2009)
- I-495 Corridor Study (2009)
- Open Space and Recreation Plan (2017)
- ADA/504 Self-Evaluation and Transition Plan (2018)
- Complete Streets Prioritization Plan (2019)
- Housing Production Plan (2021)
- Apple Country Natural Climate Solutions Project (2021)
- Business District Assessment and Market Analysis (forthcoming, 2022)
- Bolton Municipal Building Conditions Assessment (forthcoming, 2022)
- Nashua River Communities Resilient Lands Management Project (ongoing, 2023)

Draft Master Plan Vision Statement

At one level, a community is where we pursue our basic human needs for shelter, sustenance, safety, and security. But at another level, a community can also serve our human needs for connection, purpose, creativity, expression, relationship, collaboration, and the pursuit of happiness. We envision a Bolton that aims to promote human flourishing along all these dimensions.

To make Bolton a true home to all residents, a place of welcome to all visitors, and a source of well-being in the future, we shall use our collective resources to preserve and promote our core values of Community, Opportunity, Mobility, and Environment.

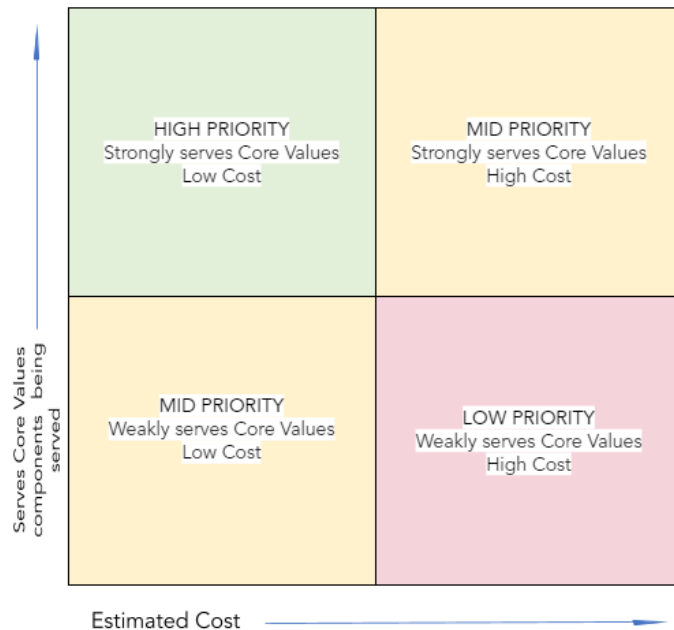
Core Value	Elements
COMMUNITY	<ul style="list-style-type: none">• Spaces and events that are welcoming and engaging, and that foster in-person connection and collaboration.

	<ul style="list-style-type: none"> • Public safety and public health systems that meet multifaceted needs of residents and visitors. • Support of cultural programs, the arts, and local non-profits. • Historical awareness and understanding. • Conscious consideration of diversity (age, race, socioeconomic status, disability status, etc.). • Accessible, effective, and efficient municipal services.
OPPORTUNITY	<ul style="list-style-type: none"> • Diverse housing (types, sizes). • Affordable housing (and housing for local employees). • Employment opportunities. • Business / commerce / amenities. • Civics / participation in self-government. • Conscious consideration of equity (age, race, socioeconomic status, disability status, etc.). • Life-long learning and education.
MOBILITY	<ul style="list-style-type: none"> • Improve physical and virtual connectivity. • Transportation infrastructure. • Multi-modal ways to get around town (walking, biking, driving). • De-congestion. • Sensibly located and accessible gathering places.
ENVIRONMENT	<ul style="list-style-type: none"> • Conserve/protect open space & natural resources. • Support agriculture. • Prepare for climate change. • Waste management & recycling. • Physical & psychological health.

Below is a basic framework for assessing the priority of specific proposals.

The x-axis represents a proposal's estimated cost, and it should incorporate considerations of money, time, staff responsibility, and volunteer responsibility.

The y-axis represents the extent to which a proposal serves our Core Values, and it should incorporate considerations of both magnitude and number. For example, one proposal could very strongly serve the single Core Value of Environment. Another proposal could moderately serve the two Core Values of Environment and Community.



Project Management and Responsibilities

The consultant will work under the guidance of the Town Planner and Master Plan Steering Committee Chair and Vice Chair. The Master Plan Steering Committee and Planning Board will provide further advisory guidance. The Town Planner will serve as the day-to-day liaison to the consultant throughout the Master Plan process and is able to offer 8 hours per week of support to this project.

Scope of Work

Task 1. Data Review and Project Kickoff

- a) Review applicable documents and data sets;
- b) Discuss and refine project approach/scope in detail;
- c) Share contacts and coordinate efforts for outreach strategy;
- d) Provide draft vision statements, goals, and objectives;
- e) Prepare an analysis presenting current development and socio-economic trends extended to the year 2040, assuming no Town intervention in zoning or other policies. Rather, the analysis will attempt to depict what the Town would look like in 2040 if all policies and zoning remain unchanged. This analysis will form the base line data to help the Town consider whether the vision for the community matches the trends analysis;
- f) Conduct a kick-off meeting/site visit with Planning Department Staff and Members of the Master Plan Steering Committee
 - a. Discussion of approaches to guide zoning and land use decisions during the Master Plan process.

Task 2. Development of Plan Components

- a) **Climate Change & Action**
Bolton's Master Plan will use Climate Change & Action as a guiding principle and practice throughout each of the plan's chapters and will be represented in the Implementation Matrix, both directly and indirectly. The Master Plan must be consistent with the Apple Country Natural Climate Solutions Project (2021) and the forthcoming Nashua River Communities Resilient Lands

Management Project. In addition, 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 consultant will need to synthesize data found in the Open Space and Recreation Plan (2017), Hazard Mitigation Plan (2018), and the Apple Country Natural Climate Solutions Project (2021). This section must ensure alignment with Master Plan recommendations on topics such as transportation, land use, housing, and economic development.

The Master Plan should explore or establish:

- Strategies to reduce Bolton's carbon footprint through energy conservation, use of renewable energy, and town-owned or shared renewable energy generation;
- Mitigation and resilience strategies related to working and natural lands, housing, transportation, agriculture, energy use, land conservation and preservation, recreation, with the goal of making the community more resilient to climate hazards and advance the Massachusetts Sustainable Development Principles;
- Strategies to promote energy efficiency and use of clean energy for both municipal operations and residential decision making;
- Green Building Codes;
- Areas of Town suitable for renewable energy technologies, including both rooftop and ground-mounted solar;
- Areas of Town suitable for electric vehicle charging stations;
- Programs and opportunities to assist existing building owners with energy reduction;
- An approach to measuring the Town's progress toward its sustainability goals;

b) Land Use

This component of the Master Plan will define optimum sustainable development patterns, density, and other standards for each land use classification and location in Bolton. The Land Use section should specify priority development and conservation areas consistent with the Apple Country Natural Climate Solutions Project (2021) and include an existing land use map, relevant population, housing, and growth projections, with build-out analyses for both residential and commercial uses. This will include an evaluation of land use tools such as low impact development standards, the existing Mixed-Use Village Overlay District bylaw, Design Review guidelines, Transfer of Development Rights, sustainable development principles, and Adaptive Reuse.

Tasks include:

- Prepare a build-out analysis presenting current development, demographic, and socioeconomic trends to the year 2040. An initial build out analysis should assume all existing regulations and bylaws around zoning and land use remain the same, with no town intervention. A second build-out should incorporate any proposed Zoning Bylaw to be created or modified resulting from implementation of the recommended changes to the Zoning Bylaw and/or Zoning Map.
- Assist the town in developing present and future land maps.
- Assist the town in quantifying the current area per land use and area per zoning district, as well as the area that remains developable in each zoning district.
- Analysis of zoning districts and land use change to be made.

c) Housing

This component shall identify current and future housing needs in Town, based on economic and demographic trends, and shall identify programs and policies by which Bolton can meet those needs in a sustainable manner. This component will be consistent with Bolton's Housing Production Plan

(2021). Identified housing goals include: promote a wider range of housing types in Bolton that remain harmonious with the Town's character; create housing options that increase the retention of young families and senior citizens; introduce or modify zoning bylaws to encourage quality development patterns that maximize resource protection while optimizing the use of space; implement housing strategies outlined in Bolton's Housing Production Plan (2021) to create affordability and housing diversity; inform and educate residents on Bolton's housing challenges and promote strategic community engagement.

Tasks include:

- Conduct a detailed population projection analysis to the year 2040;
- Compile a comprehensive, detailed description of policies to encourage the development of housing to meet current and projected needs. This may include infill development, traditional neighborhood development, improved inclusionary zoning, density bonuses and mixed-use and rental development;
- Compile a detailed description of programs to assist residents in attaining affordable housing;
- Identification of locations appropriate for housing development of various densities and types, with appropriate deference to public opinion and Bolton's character;
- Consideration of strategies to aid the Town in achieving and maintaining certification under MGL Chapter 40B;
- Ensuring consistent strategies that link Bolton's housing initiatives with other community goals, including sustainability, land conservation, economic development, and historic preservation.

d) Economic Development

This component assesses the current status of economic activity in Bolton and efforts to further develop these activities consistent with residents' needs and the character of the town. The consultant shall guide the Town in considering appropriate ways government can support and build upon existing commercial enterprises and market trends while supporting sustainable strategies to improve Bolton's business climate and attract additional business and residential investment. The consultant should provide recommendations of how to right-size the existing commercial districts; whether districts need consolidation or if the Town could support multiple economic centers.

The Town is currently undertaking a Business District Assessment and Market Analysis, though the Town lacks a unified economic vision. This component of the Master Plan includes the following tasks:

- Create an inventory of industrially zoned land and review of existing inventory of Business District;
- Complete a comprehensive analysis of existing conditions, including vacant and underutilized parcels, and projections of likely future conditions. This should include an analysis at existing strengths, opportunities and weaknesses in order to recommend sustainable strategies to preserve Bolton's agricultural roots while supporting an economically viable future;
- Compile economic projections based on projected population/ demographics
- Assessment of the capacity of the Town to either host additional commercial pockets or increase density of existing commercial areas;
- Identify programs or policies for expanding Bolton's economic base with sustainability in mind.

e) Cultural & Historic Resources

This component of the plan is intended to identify, assess and make recommendations on current and future cultural resource needs, and to identify and assess historical resources, including

documents and artifacts, and make recommendations on protecting, preserving, and promoting them in the future as the Town grows. In alignment with the broad vision and goals outlined through this master plan process, the Consultant shall:

- Inventory existing natural, cultural, and historic resources in the town;
- Recommend strategies for preserving and enhancing these resources;
- Analyze impact of any recommended land use and/or zoning changes on natural, cultural, and historic resources;
- Recommend strategies for efficient and effective cultural and historic resource management, including volunteer committees or non-profits;
- Analyze impact of any recommended changes to natural, cultural, and historic resources on population health.

f) **Municipal Facilities & Services**

This component includes an inventory of existing public facilities and services. An inventory of municipal facilities is currently underway. Tasks include:

- Analyses of each facility and service, specifically noting any deficiencies that may exist currently or in the future and building off of the Bolton Municipal Building Conditions Assessment (forthcoming, 2022);
- Determine the adequacy of the elementary schools for which Bolton is responsible (Emerson School and Florence Sawyer School) based on population and population demographics projections and anticipated curriculum requirements;
- Given the results of the evaluation and projections above, determine whether the existing facilities are adequate, need significant improvements, additions or new facilities;
- Determine whether there is sufficient Town property to accommodate additions or new facilities, assuming analysis and projections suggest they are required;
- Recommendations to address each deficiency in a sustainable manner;
- Recommendations to coordinate the long-range planning efforts of municipal departments and the creation of a user-friendly capital improvement program with a corresponding budget;
- Analyze and assess how proposed policies may impact projected school enrollment;
- Consider the needs for adult and continuing education in support of an economic development strategy;
- Project the extent of Town facilities required to accommodate the needs of the Town using population demographics and input from Town government, Bolton schools and residents;
- Investigate the extent and types of facilities in similar towns to benchmark Bolton's facilities and help project needs.

g) **Open Space & Recreation**

This component of the Master Plan will address how to support quality facilities and programming to meet the needs of the community. The Master Plan must be consistent with the current Open Space & Recreation Plan (2017), understanding that the Town has made great progress in Parks & Recreation programming since the publication of the OSRP. The consultant shall help guide the Town in weighing trade-offs between various land uses and competing demands within the master planning context. Priority parcels will be identified for future protection and current and projected population demographics will be examined to determine the current adequacy and future needs for open space and recreation including additional passive recreation (hiking, biking, horse trails, etc.) and playing fields for organized sports. The current and projected need will be benchmarked to corresponding open space and recreational facilities in larger towns in the vicinity. Tasks include:

- Inventory of recreational resources;
- Identification of policies and programs to enhance and promote recreational resources;
- Review existing open space in Bolton and assess usage by residents;

- Identify future open space opportunities from major land parcels;
- Identify new locations for organized sports fields based on population growth.

h) Transportation and Mobility

This component of the Master Plan will analyze the Town's current and proposed transportation system, focusing on major streets and roads, pedestrian circulation, bicycle paths, and parking.

Tasks include:

- Analyze baseline data with projections through 2040 detailing journey-to-work data, commuter data, car ownership data, walk-to-school data, and other relevant statistics;
- Review data and public input from the Complete Streets Prioritization Plan process;
- Identification and assessment of circulation system problems and requirements;
- Assess the current status of sidewalks, pedestrian and cyclist connectivity, and ADA access;
- Provide recommendations for strategies to improve multi-modal mobility within Town and to key regional destinations;
- Considerations of locations for future multi use paths;
- Provide recommendations of how to reduce automobile use and increase regional connectivity, such as review of first mile/ last mile programs, designation of carpool lots, micro-transit opportunities, or shuttle services to the commuter rail.

Task 3. Implementation

The Implementation Plan is essential to the success of the Master Plan. The Town sees the Implementation Plan as closely tied to the Vision and Goals section of the Master Plan, and expects the visioning process to inform prioritization of implementation steps. The Master Plan Steering Committee views the Master Plan as a 'living document', with the understanding that the implementation matrix may need to be amended from time to time in order to be consistent with the Master Plan, regional efforts, and accomplished tasks. The identified goals for each element of the Master Plan shall have a detailed implementation plan.

In the Implementation Plan, the Consultant shall:

- Provide details on the municipal regulatory structures that need to be amended to achieve the specified goals;
- Identify which entities are best suited to take responsibility for carrying out the steps needed to achieve the goals of the Master Plan;
- Prepare a clear timeline for implementation that considers how best to prioritize the goals of the Master Plan, based on the community visioning process.
- Recommend zoning and general by-laws, and/or policy changes as well as potential capital improvement details, additional studies, and additional strategies that may be recommended through the Master Plan process. The consultant is also encouraged to be innovative and creative with the Implementation part of the plan. Some ideas may be "next step" kits for top priority projects and/or a related website or social media platform to keep the public informed about ongoing progress

Task 4. Public Outreach and Engagement

Rather than a discrete task, outreach and engagement will occur throughout the project. The Town of Bolton recognizes the need of making the Master Plan process as community-based and transparent as possible, providing opportunities for learning as well as engaging community discussion. The Master Plan will define a community-based vision based upon broad and inclusive public engagement to ensure a mindful approach to engaging stakeholders, interest groups, residents, property owners, businesses, and those who live or work in Bolton. The Master Plan Steering Committee has developed a working public engagement approach that should be confirmed by the consultant. For the purposes of this project, engagement includes

interviews, surveying, newspaper articles, the Town webpage, social networks, presentations at public meetings, charrettes and public forums.

The consultant shall attend a minimum of six (6) Master Plan Steering Committee or Planning Board meetings, which may be held online via Zoom, depending on current COVID-19 precautions and extensions of the Open Meeting Law. In addition, the consultant must be prepared to facilitate public forums as part of the public participation component of this Master Plan. Up to four (4) public forums will be held on specific issues related to the Town to provide opportunities for information gathering and stakeholder engagement in an array of issues central to the Master Plan. These forums may be held in person or online, depending on current COVID-19 precautions. The consultant should provide commentary on their experience with organizing and facilitating virtual public forums, as the Master Plan Steering Committee sees these as a valuable tool to engage residents who may otherwise be unable or unlikely to attend.

Deliverables

A final report containing all written materials including maps, tables, charts, and photographs, as well as an executive summary. Maps, large charts and/or spreadsheets should be 11"x17". All other materials will be 8.5" x 11". Twenty (20) bound copies. One (1) loose leaf reproducible copy. Electronic copies of the complete final report, plus any material generated during the project including data, GIS data layers and maps, and files created through this project. Lastly, the consultant shall provide suggested formatting and materials for a public facing webpage within the Town of Bolton's website to track Master Plan implementation progress over time.

Section IV: Proposal Preparation, Evaluation, & Selection

The successful candidate or firm must have in-house personnel who have related experience and backgrounds in, and are qualified to perform the various aspects of, the required services.

Minimum Qualifications

The following items are considered minimum criteria for consideration:

- The consultant shall have a minimum of five years of experience with successful planning and facilitating of community visioning or similar process in a group setting for local master planning, preferably in Massachusetts;
- Written evidence of the firm's capability to effectively complete a community visioning planning process that results in practical ideas, including a description of the firm's familiarity and expertise in public engagement, public participation, and facilitation;
- Excellent writing skills;
- Demonstration of graphic and visual skills necessary to prepare a presentation and design a public engagement session such as power point and mapping;
- Experience with general community planning and development, comprehensive/master planning and implementation, conducting community/public workshops, consensus building, preparing maps and other graphics for presentation;
- Understanding of the nature of small and affluent towns;
- Ability to work collaboratively to engage citizens with a variety of concerns, fears, and distrust;
- Ability to engage residents and citizens to gain their trust and input;
- Minimum 3 references of successful completion of project of similar scope and service, completed within the last five years.

Evaluation Criteria for Selection

Each proposal shall be reviewed by an Evaluation Committee comprised of the Chair and Vice Chair of the Master Plan Steering Committee, the Chair of the Planning Board, and the Town Planner. Each of the following criteria will be evaluated by the committee and rated as follows: "Highly Advantageous", "Advantageous", "Non-Advantageous", and "Unacceptable":

1. Completeness of the proposal
 - "Highly Advantageous" if the proposal is complete and thorough in every detail;
 - "Advantageous" if the proposal contains one (1) to two (2) omissions;
 - "Non-Advantageous" if the proposal contains between three (3) and five (5) omissions;
 - and, "Unacceptable" if the proposal contains more than five (5) omissions.
2. Desirability of approach to the project, as well as a demonstrated understanding of all project components and public outreach needs. The plan of services should be detailed and logical, and demonstrate efficiencies and creativity in completing the project within the Town's time line.
 - "Highly Advantageous" if the plan of services proposes a detailed, logical, innovative, and comprehensive methodology for producing a complete project that addresses all of the required issues and project objectives stated in the RFP.
 - "Advantageous" if the plan of services proposes a credible scheme with multiple positive attributes for producing a complete project that addresses most if not all of the required issues and project objectives stated in the RFP.
 - "Non-Advantageous" if the proposed plan of services is not sufficiently detailed to fully evaluate, or the plan does not adequately address all the components necessary to produce a complete project that addresses all of the required issues and project objectives stated in the RFP.
 - and, "Unacceptable" if the proposed plan of services is lacking in multiple aspects and thus does not adequately address the project objectives stated in the RFP.

3. Ability of the consulting firm to provide a significant, robust, and innovative public participation and community engagement process to engage the public, partners, and stakeholders, including those least likely to participate.
 - “Highly Advantageous” if the consultant has proposed a breadth of traditional and innovative methods to engage the community in development of the Master Plan and has provided evidence of its experience in both. The proposal is detailed and comprehensive and includes specific ideas for outreach to segments of the community that may be challenging to engage. The consultant includes particular expertise in community engagement practices.
 - “Advantageous” if the consultant has proposed a credible approach using traditional and non-traditional methods of community engagement and has provided evidence of its experience in doing both.
 - “Non-Advantageous” if the consultant has proposed a limited approach using traditional methods of community engagement and has not included the use of non-traditional community engagement activities in their proposal.
 - and, “Unacceptable” if the consultant’s plan for community engagement is not sufficiently detailed to fully evaluate.
4. Experience of consulting firm with similar site work as required for this project
 - “Highly Advantageous” if three (3) or more than three (3) similar projects successfully completed within the last seven (7) years;
 - “Advantageous” if between one (1) or two (2) similar projects successfully completed within the last seven (7) years;
 - and “Non-Advantageous” if no similar projects successfully completed within the last five (5) years and/or the projects had problems.
5. Identify and set forth qualifications of the in-house staff and outside consultants (if needed) who will work on the project. Include the individual who will serve as the contact person and have primary responsibility for the project. The technical team shall not include office support or clerical staff.
 - “Highly Advantageous” if the project manager has at least seven (7) years of relevant work experience and technical qualifications (e.g. AICP certification, etc.);
 - “Advantageous” if the project manager has between five (5) and seven (7) years’ experience and technical qualification (e.g. AICP certification, etc.);
 - “Non-Advantageous” if the project manager has less than five (5) years’ experience and technical qualifications;
 - and “Unacceptable” if any member has no relevant experience.
6. Reference checks
 - "Highly Advantageous" if all references are positive;
 - "Non-advantageous" if some references are less positive;
 - "Unacceptable" if some references are negative.

Selection Process

Proposals will be evaluated upon the basis of the criteria for selection set forth in Section IV above. The Town reserves the right to request further information from the three highest ranked applicants. The Evaluation Committee will evaluate the proposals and recommend a Proposer for award by the Town of Bolton. Any contract issued in response to a successful proposal must be approved by the Planning Board and the Town Administrator as Chief Procurement Officer. The Town reserves the right not to make an award on this contract if doing so is in the best interest of the Town.

Section V: Award and Contract

Rule for Award: The Town may award a contract to the responsive and responsible proposer submitting the most advantageous proposal, taking into consideration the evaluation criteria as well as the proposal price.

If necessary, in order to distinguish the qualifications and clarifications between proposers, firms may be invited to make a presentation before the Master Plan Steering Committee or Planning Board.

The Town of Bolton reserves the right to amend the scope of services to fit within the Planning Board's current budget allocation.

The Town of Bolton reserves the right to reject any Proposal or to waive any informality in the process if it is in the best interest of the Town.

The project and services provided by the successful candidate will comply with all Bolton and Commonwealth of Massachusetts standards and codes, and with M.G.L. Chapter 30B.

All proposal prices submitted in response to this Request for Proposal shall remain firm for ninety (90) days following the due date for proposals.

Section VI: Contact Information

Please contact the Town of Bolton for clarification of this Request for Proposals, and direct all inquiries regarding the Request for Proposals to:

Valerie Oorthuys, AICP, Town Planner
Planning Department
663 Main Street
Bolton, MA 01740
978-779-3308
townplanner@townofbolton.com

The Town of Bolton is an equal opportunity employer.

Town of Bolton

STATEMENT OF TAX COMPLIANCE

Pursuant to M.G.L. c.62C, S.49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all the laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

NAME OF PROPOSER(S):

SIGNATURE(S):

PRINTED NAME(S):

NAME OF BUSINESS:

ADDRESS:

SOCIAL SECURITY NUMBER(S) OR FEDERAL ID NUMBER: _____

Town of Bolton

CERTIFICATE OF NON-CONFLICT OF INTEREST

The undersigned certifies under penalties of perjury that no official or employee of the governmental body for which the attached solicitation is proposed is pecuniarily interested in this proposal or bid or in the contract which it offers to execute or in expected profits to arise therefrom; and further that no official or employee of said governmental body will receive an commission, discount, bonus, gift, contribution, or received from or share in the profits of any person making or performing such contract. 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.

BY: _____ SIGNATURE: _____
(COMPANY NAME)

TITLE: _____ DATE: _____

Town of Bolton

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under the penalties of perjury that this quote 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, club, or other organization, entity, or group of individuals.

(Signature of individual submitting Quote)

Town of Bolton

PRICE Quote

This form shall be used by the Contractor as their Price Quote, for the purposes of compliance with Chapter 30B of the Massachusetts General Laws. Contractors must fill out this form for each year of the contract in its entirety and submit it in a separate envelope as their Price Quote.

Quote Price for Entire Project (in numbers): \$_____

Quote Price for Entire Project (in words):

The undersigned agrees to provide the Town of Bolton with the entire services as detailed in the above defined Request for Quote at the price stated above:

Company: _____

Authorized Signature: _____

Name and Title: _____

Date: _____

Phone Number: _____

Email: _____

Company Address:
