



**Town of Stow**  
**380 Great Road**  
**Stow, Massachusetts 01775**  
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**May 3, 2023**

**Request for Proposals**

**Consulting Services for Comprehensive Plan Update**

**Due Date: June 1, 2023**

**Due Time: 1:00 p.m.**

**Town of Stow**

**380 Great Road**  
**Stow, MA 01775**

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## **MAY 3, 2023 | TOWN OF STOW NOTICE OF REQUEST FOR PROPOSALS**

*Consulting Services for Comprehensive Plan Update*

**Description:** The Town of Stow invites Qualified Proposers to submit proposals for consulting services for preparation of a Comprehensive Plan update.

**RFQ Packages:** RFP Packages will be available beginning **May 3, 2023 at 1:00 PM**. Packages are available via email by contacting [procurement@stow-ma.gov](mailto:procurement@stow-ma.gov). Packages are also available for download at <https://www.stow-ma.gov/procurement/pages/bids-and-proposals>.

**Due Date & Time:** Proposals are due by **1:00 PM on June 1, 2023**

**Place:** Proposals are to be submitted to:

Town of Stow, Attn: Procurement  
Stow Town Building  
380 Great Road  
Stow, MA 01775

**Pre-Proposal Conference:** A pre-proposal conference will be held on **May 15, 2023** at 11:00 AM via Zoom video conference at <https://us06web.zoom.us/j/86727295396> and accessed via phone at 1(929) 205-6099, with a Meeting ID of 867 2729 5396. 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/RFI's:** If you have questions about this RFP or have a request for information or clarification, please contact Valerie Oorthuys, AICP, Planning Director, at [planning@stow-ma.gov](mailto:planning@stow-ma.gov). All questions and requests for clarification must be received *in writing* by **5:00 PM on May 17, 2023**. It is anticipated that a compilation of all questions and responses will be distributed via email to prospective Proposers, along with any other final addendum by **5:00 PM on May 19, 2023**.

**Contract Info:** The Town of Stow will negotiate an industry standard contract with the successful proposer. Any contract issued in response to a successful proposal must be approved by the Town's Chief Procurement Officer.

**Project Period:** The Town endeavors to expedite all contracts within a timely fashion. Typically, a contract will be awarded within sixty (60) days of the proposal opening if not sooner, and services under the contract will commence immediately thereafter. Such services are expected to be completed within twenty-four (24) months of the contract award. The Town, at its sole election, may renew this contract for two additional one-year terms.

## **SECTION I. PROJECT DESCRIPTION AND BACKGROUND**

The Town of Stow seeks the submission of consultant proposals for technical assistance for the update of Stow's 2010 Master Plan to guide equitable and sustainable development through the year 2045. In addition to the elements statutorily required by M.G.L. c.41, §81D, the Comprehensive 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.

Known for its farms, golf courses and conservation areas, Stow is a year-round destination, including 72 holes of golf, multiple orchards and farms, which together draw visitors from throughout the region. Historically an active farming and textile mill center, Stow has transitioned into a residential suburb with a population of 7,174 (as of the 2020 Census) while sustaining its agricultural heritage. The Town of Stow is a designated Green Community.

The Town of Stow 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. Stow is within the Nashoba Regional School System and has one elementary school and one middle school, with the regional high school located in Bolton. Stow has 179 subsidized housing units, a total of 7.16% of its housing stock. Two Comprehensive Permit developments, one in the permitting process and one anticipated filing, will bring the Town above the 10% minimum SHI threshold.

The Assabet River anchors the Town's recreational draw, providing boating and trail access to large segments of the Assabet River National Wildlife Refuge, a trailhead to the Assabet River Rail Trail, and numerous local conservation areas. Stow is bordered by Bolton and Harvard to the west, Maynard and Sudbury to the east, Hudson to the south, and Boxboro and Acton to the north. While West Acton Road and Gleasondale Road (Route 62) bisect the Town from north to south, Great Road (Route 117) traverses east/west, altogether splitting the Town into four quadrants.

The Great Road corridor contains most of Stow's commercial development, yet also contains the historic Town Center and Lower Village neighborhood. Several of the Town's municipal buildings, including the Randall Library, Town Hall, Pompositticut Community Center, and Center (elementary) School are located along Great Road.

Stow's Town Center and the Lower Village neighborhood contain a significant number of public service destinations. At the southern end of Gleasondale Road (Route 62) lies Gleasondale Village (also known as Rock Bottom), another historic village that has a long history as a major milling center in New England. Key destinations within Gleasondale Village include historic sites such as the Randall-Hale Homestead, Gleason Homestead, Gleasondale Mill, Gleasondale Mill Boarding House, and the Gleasondale Dam and Canal. Gleasondale Village is primarily a residential area abundant with multi-family, medium-density, and low-density housing types. The mill buildings are still home to light industrial uses.

The remainder of the Town contains more residential uses and open space for passive and recreation purposes. There are five orchards open to the public during apple-picking season and four golf courses that currently provide approximately 500 acres of open recreational space. Related tourism during the late summer and fall months bring thousands of visitors to Stow, creating seasonal traffic patterns and congestion. Stow has an abundant amount of forest and wetlands that offer residents access to hiking, rail trails, paddling, and bird watching within a portion of the 2,230-acre Assabet River National Wildlife Refuge. Stow is also home to the Minute Man Air Field (a private general aviation airport for public use) and Crow Island Air Park.

There are several notable ongoing planning and permitting projects in Stow:

- **Stow Acres Golf Course:** Stow Acres is the Town's largest golf course and the largest undeveloped parcel in Stow. Through a partnership inclusive of the owners of Stow Acres, the Town, Stow Conservation Trust, and a private for-profit developer, priority locations on the site were identified to focus development to meet the Town's housing diversity needs and areas that have the highest conservation and recreation values. Town Meeting voters approved the purchase of a Conservation Restriction on the 151-acre South Course and the purchase of 2/3 of the North Course. The Conservation Commission is underway with guiding the development of a Climate Resilience Master Plan for the North Course. The for-profit developer will shortly provide a Comprehensive Permit application for the creation of 190 units of housing through the Local Initiative Program.
- **Assabet River Rail Trail Extension:** The Town has received a federal earmark for the design of a 1.8-mile extension of the Assabet River Rail Trail along Track Road in Stow. The Town is currently working with engineering consultants on a preferred design to be approved by MassDOT and FHWA.
- **Public Water Supply Feasibility Study:** The Town of Stow has contracted with Stantec to complete the work associated with determining the feasibility of establishing a Public Water Supply, and subsequent groundwater exploration for servicing the Lower Village Business District. Stow lacks public water and sewer infrastructure. Residences in Stow either use private wells or privately operated public water supplies. Businesses are also constrained by the lack of infrastructure, which this study seeks to address.
- The Town has recently updated zoning bylaws related to age-targeted neighborhood development. The Planning Board is underway permitting a 140-unit development through this revised bylaw.
- An update of the Town's Open Space and Recreation Plan is expected to be completed this summer. The plan should be incorporated into the Comprehensive Plan to the extent appropriate.
- The Town's Green Advisory Committee is underway with the creation of a Climate Action Plan.
- The Town has contracted with MAPC for the provision of a Housing Production Plan update. This plan is intended to be completed by December 31, 2023.

The 2010 Master Plan includes the following vision:

*We envision a future in which Stow continues to place a high value on quality education, recreation, and agriculture. As a community, we will welcome diversity and place a high priority on providing housing that matches various ages and income levels. The need for economic growth will be balanced with maintaining a small-town feel. Recognizing the dual goals of physical fitness and community warmth, neighborhoods will be physically linked through a natural trail network and sidewalks. Through planning, Stow will maintain its rural character, ensure that the environment is protected by supporting the goals of the Open Space and Recreation Plan, and provide housing choice. Above all, the Town will continue to ensure that its citizens have the highest possible quality of life.*

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

- Stow Master Plan Update (2010)
- Gleasondale Village Revitalization Planning (2013-2015)
- Town Center Study (Phase I, 2014; Phase II, 2015)
- Open Space and Recreation Plan (2016, update forthcoming)
- Housing Production Plan (2016, update forthcoming)

- Complete Streets Prioritization Plan (2018)
- Business District Assessment and Market Analysis (2018)
- Municipal Vulnerability Preparedness Final Report (2018) and 2022 Summary and Action Update
- Lower Village Revitalization Subcommittee Final Report (2019)
- Public Water Supply Feasibility Study (forthcoming)

## **Objectives**

The Comprehensive Plan is to be prepared and completed in accordance with the requirements of M.G.L. c.41, §81D and may include additional elements desired by the Town. For example, the Town desires this Comprehensive Plan and surrounding process to address the following:

- Sustainability and climate resilience should be woven throughout all elements of the Plan and may also require a chapter to itself and will be represented in the Implementation Plan, both directly and indirectly. 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).
- Diversity and inclusion also need to be grounding principles of this project. A robust public process and creative community engagement strategy will be critical to ensuring the Comprehensive Plan fairly reflects the needs of the community. This process will require many different kinds of engagement methods. The Comprehensive Plan Committee will provide support and feedback on how to best meet this objective throughout the planning process.
- Stow’s Comprehensive Plan must also incorporate a regional approach, which assesses each element in the Plan against any applicable regional plan to ensure consistency. The Town of Stow 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.

Furthermore, the Town of Stow seeks a Comprehensive Plan that:

- Is concise, comprehensively written and provides a basis for decision-making about the Town’s future;
- Articulates an easily understood vision of the Town’s future, crafted from a wide and varied range of community perspectives, and offers an aspirational outlook;
- Is a well-grounded vision supported by a clear, creative, specific, realistic, and cost-effective implementation strategy;
- Provides a basis for decision making about Stow’s physical development;
- May be treated in future years as a ‘living plan’, so that chapters and the Implementation Plan may be updated more routinely.

## *Project Management and Responsibilities*

The consultant will work under the guidance of the Planning Director and Comprehensive Plan Committee. The Planning Board will provide further advisory guidance. The Planning Director will serve as the day-to-day liaison to the consultant throughout the Comprehensive Plan process.

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 Services are anticipated to take approximately two years from the initial date of contract. 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 or through hybrid formats. 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.

#### *Funding*

Voters will be requested to approve \$100,000 for the Comprehensive Plan Update at the May 13, 2023 Annual Town Meeting. Once appropriated, these funds will provide a community match for a further grant funding request through the Community One Stop for Growth application, due by June 2, 2023. As such, consultants may wish to provide a phased approach.

## **SECTION II. SCOPE OF SERVICES**

The following services and activities are anticipated to be performed by the Consultant in the following sequence proposed. In the event the Consultant believes an alternative sequence would more accurately reflect the goals of the project, an amended sequence shall be proposed.

### **Task 1. Project Initiation, Outreach, and Management**

- a) Review applicable documents and data sets;
- b) Discuss and refine project approach/scope in detail;
- c) Review the Planning Board's working draft of Community Engagement Guidelines and Resources and confirm a public engagement strategy;
- d) Review results from initial framework survey, made available to the public in January 2023;
- e) Attendance at meetings of the Comprehensive Plan Committee, which may be held virtually, in person, or through a hybrid model.

Deliverables include: Project Management Plan, ongoing outreach plan including website content, ongoing Committee meeting attendance

### **Task 2. Existing Conditions Analysis**

- a) Prepare an analysis presenting current development and socio-economic trends extended to the year 2045, assuming no Town intervention in zoning or other policies. Rather, the analysis will attempt to depict what the Town would look like in 2045 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;
- b) Identify and define the subject areas to be covered in the existing conditions evaluation, covering the subject areas and themes as anticipated under Task 4;
- c) Literature review and coordination: Work with staff to determine how best to integrate the work of other departments and prior planning efforts into the plan in a way that avoids duplication and builds on these and other efforts.
- d) Observational studies and fieldwork: define and develop an on the ground understanding of Stow which will complement and enhance an understanding of the Town, community input, and other research.

- e) Data analysis and mapping: for key issues, themes, and elements, collect necessary information and analyze the current conditions using a range of data sources to synthesize, highlight, interrelate, and otherwise enhance the visualization of data and foster understanding and insight; these analyses should employ various metrics, projections, networks, assessments, and mapping, organized by theme. Analysis derived from census data should be prepared and formatted in a manner that allows for streamlined updating as Census 2020 data is available.
- f) Attendance at meetings of the Comprehensive Plan Committee, which may be held virtually, in person, or through a hybrid model.

Deliverables include: A report summarizing the existing conditions will be prepared in Portable Document Format (PDF) format. This plan will include a comprehensive examination of population, demographic, and economic trends, as well as summary of existing conditions relative to the Task 3 subject areas and themes. The initial draft will be circulated for review by staff and the Comprehensive Plan Committee. The final report will be seamlessly incorporated as a component of the final plan.

### **Task 3. Visioning**

Based on community input and discussion, outcomes of the existing conditions analysis, and outcomes of recent planning efforts, the consultant and Comprehensive Plan Committee will develop a community informed vision statement that will guide analysis, evaluation and recommendations presented in the plan. Building from the vision statement, the consultant and Comprehensive Plan Committee will generate a clear set of community identified goals as a foundation for plan recommendations.

- a) Attend and facilitate (with assistance from staff and the Comprehensive Plan Committee) public visioning sessions.
- b) Continue public engagement with key stakeholders, including Town Staff
- c) Conduct electronic or asynchronous methods of engagement (e.g. vision boards, virtual focus groups) to engage those unlikely or unable to attend public meetings
- d) Synthesize public comments
- e) Attendance at meetings of the Comprehensive Plan Committee, which may be held virtually, in person, or through a hybrid model.

### **Task 4. Development of Plan Components**

The Comprehensive Plan shall include all requirements as set out in M.G.L. c.41, §81D and summarized here:

- Land use plan component which identifies present land use and designates the proposed distribution, location and inter-relationship of public and private land uses. This element shall relate the proposed standards of population density and building intensity to the capacity of land available or planned facilities and services. A land use plan map illustrating the land use policies of the municipality shall be included.
- Housing component which identifies and analyzes existing and forecasted housing needs and objectives including programs for the preservation, improvement and development of housing. This element shall identify policies and strategies to provide a balance of local housing opportunities for all citizens. The Comprehensive Plan should incorporate the upcoming HPP update to the extent appropriate.
- Economic development component which identifies policies and strategies for the expansion or stabilization of the local economic base and the promotion of employment opportunities.
- Natural and cultural resources component which provides an inventory of the significant natural, cultural and historic resource areas of the municipality, and policies and strategies for the protection and management of such areas.

- Open space and recreation component which provides an inventory of recreational resources and open space areas of the municipality, and policies and strategies for the management and protection of such resources and areas. The Comprehensive Plan should incorporate the upcoming OSRP update to the extent appropriate.
- Services and facilities component which identifies and analyzes existing and forecasted needs for facilities and services used by the public.
- Transportation component which provides an inventory of existing and proposed circulation and transportation systems.
- Scheduled expansion or replacement of public facilities or circulation system components and the anticipated costs and revenues associated with accomplishment of such activities shall be detailed.

In addition to requirements set out in Massachusetts General Law shall, the Comprehensive Plan shall also address:

- Sustainability and climate resilience
- Diversity, equity and inclusion element which identifies and analyzes existing and forecasted needs for land use policies that support a diverse populace.

The Consultant shall:

- Attend and facilitate (with assistance from staff and the Comprehensive Plan Committee) public forums on key topics for the development of the Plan;
- Continue public engagement with key stakeholders, including Town Staff
- Conduct electronic or asynchronous methods of engagement (e.g. vision boards, virtual focus groups) to engage those unlikely or unable to attend public meetings
- Synthesize public comments
- Attend meetings of the Comprehensive Plan Committee, which may be held virtually, in person, or through a hybrid model.

Town Staff are able to prepare final GIS maps for inclusion in the Comprehensive Plan. Staff and members of the Comprehensive Plan Committee will assist in reviews of written drafts and will participate in presentations or facilitate workshops as needed.

### **Task 3. Implementation**

The Implementation Plan is essential to the success of the Comprehensive Plan. The Town sees the Implementation Plan as closely tied to the Vision and Goals section of the Comprehensive Plan and expects the visioning process to inform prioritization of implementation steps. The Implementation Plan should be able to be edited and used as a ‘living document’ so that it may be amended from time to time in order to be consistent with updates to the Comprehensive Plan, regional efforts, and accomplished tasks. The identified goals for each element of the Comprehensive 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 Comprehensive Plan;
- Prepare a clear timeline for implementation that considers how best to prioritize the goals of the Comprehensive 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 Comprehensive Plan process. The consultant is also encouraged to be innovative and creative with the Implementation 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 Stow recognizes the need of making the Comprehensive Plan process as community-based and transparent as possible, providing opportunities for learning as well as engaging community discussion. The Comprehensive 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 Stow. The Planning Board has developed a working draft of Community Engagement Guidelines and Resources that should be confirmed and piloted by the consultant and Comprehensive Plan Committee. For the purposes of this project, engagement includes interviews, surveying, newspaper articles, the Town webpage, social media posts, virtual forums, virtual boards, presentations at public meetings, charrettes and public forums.

The consultant shall attend a minimum of eight (8) Comprehensive Plan Committee 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 Comprehensive Plan, with assistance from Town Staff and the Comprehensive Plan Committee. Town Staff will assist with forum preparation, including the provision of GIS maps and additional materials for interactive stations.

#### **Deliverables**

A final report containing all written materials including maps, tables, charts, and photographs, as well as an executive summary and one page ‘snapshots’ of each chapter. Maps, large charts and/or spreadsheets should be 11”x17” to the extent feasible. All other materials will be 8.5” x 11”. Five (5) bound copies. One (1) loose leaf reproducible copy. Electronic copies of the complete final report, plus any material generated during the project including presentation materials, data, GIS data layers and maps, and files created through this project shall be provided to the Planning Department in reproducible form. Lastly, the consultant shall provide suggested formatting and materials for a public facing webpage within the Town of Stow’s website to track Comprehensive Plan implementation progress over time.

### **SECTION III. PROJECT ASSUMPTIONS**

This project will be coordinated through a Project Team made up of the Town Administrator, Town Planner, and Conservation Director, with assistance from other Department Heads and Committee liaisons as appropriate. All contact between the consultant and the Town will begin with the Planning Department office, with the Planning Director as the primary project lead for purposes of coordinating day-to-day communication and contract administration with the Consultant. The Project Team will assist the consultant in coordinating public meetings, identifying stakeholders, coordinating meetings with the landowners, as well as collecting and preparing documents and data for the consultant’s review.

### **SECTION IV. GENERAL REQUIREMENTS AND PROPOSAL INSTRUCTIONS**

#### **A. Decision to use RFP Process**

Pursuant to M.G.L. c. 30B, s.6(a), the Town’s Chief Procurement Officer has determined that selection of the most advantageous proposal requires comparative judgment of factors in addition to price. The Town seeks proposals for a Comprehensive Plan Update. The RFP process will enable the Town to provide higher ratings to consultants who have significant experience providing the specific combination of Comprehensive Planning skills and services to other municipalities or private clients as the scale requires.

#### **B. Key Project Dates and Schedule**

The following is a tentative schedule noting target dates for phases and tasks to be completed.

<b>TASK</b>	<b>Target Date</b>
Advertisement in COMMBUYS.....	May 3, 2023
Advertisement in the <i>Stow Independent</i> .....	May 3, 2023
Advertisement in Central Register.....	May 3, 2023
Pre-proposal conference at 11:00 A.M.....	May 15, 2023
Last Day to submit questions to Planning Director. All questions must be submitted in writing via email to <a href="mailto:planning@stow-ma.gov">planning@stow-ma.gov</a> by 5:00 P.M.....	May 17, 2023
Compilation of all questions and responses distributed via email.....	May 19, 2023
RFQ responses due by 1:00 P.M.....	June 1, 2023
Selection Committee reviews proposals and selects most highly advantageous proposal.....	June 8, 2023
Notification of Award.....	On or before July 1, 2023

**C. Contract and Contract Term**

After selection of the most advantageous Proposal, as determined through the process described below, a written contract shall be executed with the successful Respondent and the Town. The Town anticipates a start date no later than July 1, 2023, and term of the contract is anticipated to be through June 30, 2025.

**D. Changes to the RFP (Addenda)**

If it becomes necessary to revise any part of the RFP or otherwise provide additional information, an addendum to the RFP will be issued. Respondents who have requested and received a copy of the RFP and/or registered on the Town’s website will be notified of such addenda by email. The addenda will also be posted on the Town website. Please check the Town website for addenda before submitting a Proposal to the Town. In their submitted Proposals, Respondents shall acknowledge receipt of all addenda issued.

**E. Pre-Proposal Briefing and Questions**

A pre-proposal conference will be held on May 15, 2023 at 11:00 AM via Zoom video conference at <https://us06web.zoom.us/j/86727295396> and accessed via phone at 1(929) 205-6099, with a Meeting ID of 867 2729 5396. 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 and/or requests for clarification rising from these documents shall be submitted by 5:00 PM on May 17, 2023 to the Stow Planning Director in writing via email to [planning@stow-ma.gov](mailto:planning@stow-ma.gov). All responses to such questions/requests will be posted on the Town’s website as addendum to the RFP and will be incorporated into the RFP.

**F. Responsive Proposals**

A responsive proposal is one that has been properly and timely submitted; contains all required attachments and consists of a separately sealed Technical Proposal and a separately sealed Price Proposal meeting the Submission Requirements below. Any Proposal which fails to include any material information or documentation specified in the Submission Requirements, or which is received after the deadline, is non-responsive and will be rejected.

All Proposals shall remain valid for a minimum period of 90 days following the date Proposals are due. This provision shall be specifically referenced within a submitted Proposal.

## **G. Proposal Submittal Requirements**

1. **Technical Proposal** – One original and four copies of the Technical Proposal shall be submitted in a sealed envelope which is marked “Technical Proposal – Comprehensive Plan Update, submitted by [name of Consultant].” An electronic copy of the Technical Proposal shall be provided on a CD or thumb drive. The Technical Proposal must not contain any reference to price. The Technical Proposal must include the following:
  - i. Cover Letter indicating the Respondent’s interest and ability to complete the Scope of Services contained in this RFP. The cover letter should also acknowledge all addenda issued and be signed by a duly authorized representative of the Respondent.
  - ii. Firm profile – a description of the firm(s) involved and the relevant services offered by said firm(s). The profile should include:
    1. Legal name of the company and all contact information
    2. Principal place of business and any local offices
    3. Number of years in business and services offered
    4. Representative clients and a description of relevant engagements completed over the past five years that are similar to the one described in this RFP. If possible, the status of implementation of plans should be included.
  - iii. Personnel and Statement of Qualifications – Identification and description of the qualifications of the key personnel who will be responsible for providing services to the Town under contract along with the approximate percentage of time or hours each team member will contribute to the project. This shall include for each person:
    1. Description of specific credentials and experience
    2. Number of years of experience in providing relevant services
    3. Description of experience providing services similar to those described in this RFP. Resumes or CVs may be included.
  - iv. Approach to Work and Work Plan – A description of how the Respondent plans to approach and complete the work described in each phase of the Scope of Services and bring innovation and creativity to the items in the Scope of Services including:
    1. Outreach and information gathering
    2. Overall team structure and coordination of work, including project management and oversight structure
    3. Comprehensive plan development
    4. Proposed timeline
  - v. Additional Value-Added Services – A description of any additional work or services that the Respondent will provide the Town within the project budget in support of the work outlined in the Scope of Services which would advance community engagement.
  - vi. Work sample – A representative sample of Comprehensive Planning work completed by the Respondent. Note: In the interest of conserving resources, this work sample may be provided electronically, or a link provided to the firm website. The Town reserves the right to request a hard copy as needed.
  - vii. References – A list of all clients to whom the Respondent has provided services similar to those identified in the RFP in the past five years, including name, contact information, and type of engagement.
  - viii. Certifications – Completed, signed Certifications from the RFP Appendix

**2. Price Proposal** – A Price Proposal shall be submitted in a sealed envelope which is marked “Price Proposal – Comprehensive Plan Update, submitted by [name of Consultant].” The Price Proposal must contain a fee schedule, identifying the proposed cost for each phase of the Comprehensive Planning project listed in the Scope of Services above, and the total cost of all phases of work. The price proposal should include a separate sheet with the hourly rate(s) for each member of the team should additional services be required.

#### **H. Delivery Requirements**

Proposals shall be mailed or delivered to the following address:

Procurement Administrator  
Town of Stow  
Town Building  
380 Great Road  
Stow MA 01775

All proposals must be received no later than 1:00 PM, on June 1, 2023. It is the responsibility of the Respondent to ensure that the Technical and Price Proposals are received at the proper location prior to the stated deadline. Respondents should plan accordingly for timely delivery. Faxed or emailed proposals will not be accepted.

#### **I. Town’s Reservation of Rights**

The Town reserves the right to cancel or modify this RFP, or reject all proposals, should such action be in the best interest of the Town. If any modifications are made to the RFP, an addendum will be issued as described above.

The Town reserves the right to waive any mistakes or informalities in the proposals received and may request supplementary information from any Respondent if it is determined that the granting of such waiver or the receipt of such additional information would be in the best interest of the Town.

#### **J. Proposal Corrections and Withdrawals**

Following submission of a Proposal, a Respondent is not permitted to modify such Proposal, except for minor corrections. Corrections shall be in sealed envelopes, clearly marked to indicate contents, with the name and address of the Respondent. No Proposals may be amended so as to prejudice fair competition or the Town. A request for withdrawal may be in writing.

### **SECTION V. SELECTION PROCEDURES AND EVALUATON CRITERIA**

#### **A. Minimum Criteria**

Proposals must demonstrate satisfaction of all Minimum Criteria below. Proposals that do not satisfy the minimum criteria will not be further considered.

1. The Proposal must be from one or more individuals or established businesses, corporations, partnerships, sole proprietorships, joint stock companies, joint ventures, firms, or other entities engaged in the practice of providing such services as the principal business for which the entities were formed.

2. The proposer must have a minimum of five (5) years of experience with successful planning and facilitating of community visioning or similar process in a group setting for local Comprehensive Planning, preferably in Massachusetts;
3. The proposer must have completed at least three (3) projects similar to the project described herein for other municipalities. Similar projects should involve, at a minimum, a conceptual site plan and community engagement/ outreach.
4. The proposer must have demonstrated knowledge of the fields of community visioning and goal setting, public engagement and outreach, consensus building, communication and coordination, data collection and analysis, and implementation planning.
5. The proposer must be prepared to start work within 30 days of the award of the contract (on or about July 1, 2023) and work continuously to complete the project within the time anticipated in this RFP with all deliverables provided by June 30, 2025.
6. All Proposals shall be submitted to the Town of Stow as stated in Section IV. H. above. Each Proposal shall be in a SEALED envelope, clearly marked on the outside of the envelope to indicate the contents, and the name and address of the proposer.
7. The Proposal must be received by the Town of Stow before the deadline for receipt of Proposals indicated in Section IV. B, Key Project Dates and Schedule, and must be complete (must include or address all items specified in Section IV. G. Submittal Requirements). The proposer is responsible to make sure that their proposal submittal is received at the proper location as stated herein before the due date and time. Do not rely upon stated delivery times from contracted package delivery services. Proposals delivered after the proposal response deadline will be refused.
8. The proposer must have signed the Certificate of Non-Collusion and the State Taxes Certification Clause, and all other required Proposal forms and shall include them in the Proposal package.
9. The Proposal must be signed by an agent of the company who has authority to bind the company to a firm bid price.
10. All responses are to include a statement that the Proposal is in accordance with this Request for Proposals and that the proposer has read and understands all sections and provisions herein. Exceptions, if any, are to be clearly stated.

## **B. Comparative Evaluation Criteria**

Consultants must meet the minimum requirements as specified in Section V.A. Failure to meet the minimum evaluation criteria will result in immediate rejection of the submittal and will not be subject to further review.

The following criteria will be used in the evaluation of the submittals regarding the Technical or Non-Price Proposal. An **“Unacceptable”** rating in any one of the listed criterions will eliminate the proposal from further consideration. **Consultants are to address each of the following criteria in a clearly labeled section of their response and in the same order.**

1. **The Project Team** – The overall experience of the firm or team submitting the proposal, professional qualifications of the team members, and organization of the team.
  - Unacceptable:** Firm or team has less than 5 years of experience in providing Comprehensive Planning services to municipalities for similar public projects and/or no team organizational structure was provided.
  - Not Advantageous:** Firm or team has 5 years of experience in providing Comprehensive Planning services to municipalities for similar public projects. The staffing information provided may meet the Town’s needs, but the organization plan provided is not clear enough to make a determination of roles and responsibility.
  - Advantageous:** Firm or team has 5-7 years of experience in providing Comprehensive Planning services for similar public projects to municipalities. The staffing information and team organization plan provided will meet the needs of the Town and show the proposer’s commitment to the project by providing an experienced team of quality professionals with defined roles.
  - Highly Advantageous:** Firm or team has more than 7 years of experience in providing Comprehensive Planning services for similar public projects to municipalities. The staffing information and team organization provided will exceed the needs set forth by the Town and shows the proposer’s commitment to putting their best and most experienced staff and resources into this project. Project roles and responsibility are clearly defined.
  
2. **Recent Relevant Experience** with projects comparable to the proposed project,
  - Unacceptable:** Firm has no experience relevant to this project
  - Acceptable:** Firm or team has completed three projects of similar scope.
  - Advantageous:** Firm or team has completed 4-9 projects of similar scope
  - Highly Advantageous:** Firm or team specializes in work of similar scope with at least ten similar projects completed.
  
3. **Description of Approach and Work Plan:**
  - Unacceptable:** The respondent does not provide an adequate approach or work plan
  - Acceptable:** The respondent proposes an acceptable approach and work plan but does little more than list the contents of the Scope of Services and timeline.
  - Advantageous:** The respondent proposes an approach and work plan that demonstrates an understanding of the project and meets or exceeds the minimum deliverables and provides an increased opportunity to identify issues and provide detailed recommendations, direction and advice.
  - Highly Advantageous:** The respondent proposes a thorough, detailed approach and work plan that exceeds the minimum deliverables and provides a superior opportunity to identify issues and provide in-depth recommendations, directions, and advice.
  
4. **References:** Provide at least five (5) favorable references with contact names and valid phone numbers of other clients whereby similar work has been performed.
  - Unacceptable:** References are not provided.
  - Not Advantageous:** References provided are not related to similar project type.
  - Acceptable:** At least two (2) references are from similar project experience.
  - Advantageous:** More than three (3) references are provided from similar project types.
  - Highly Advantageous:** All references provided are for similar project types.
  
5. **Project Understanding and Approach:**
  - Unacceptable** - Proposal did not adequately convey the proposer’s understanding of the project and the firm’s approach to completing the project successfully.

**Not Advantageous** - The response indicates the proposer may understand the Town's needs, but the plan provided is not clear enough to make a determination. The proposer's approach does not instill confidence in a plan to complete the project in a well thought out manner.

**Advantageous** - The Scope of Services response provided indicates the proposer will meet the needs of the Town; and shows the proposer's demonstrated understanding of the project and their approach to the work required to complete a successful project.

**Highly Advantageous** - The Scope of Services response provided clearly indicates the understanding and ability to successfully meet the needs of the Town; shows the proposer's demonstrated understanding of the project; their ability to bring leadership to the project and that their approach to the project demonstrates a creative and thorough process

## 6. Proposed Schedule:

**Unacceptable:** A proposed schedule was not offered.

**Not Advantageous:** The proposed project schedule does not demonstrate a plan to complete the project in a well thought out manner.

**Acceptable:** The proposed project schedule provided indicates the proposer understands the project, its scope, and its timeframes for completing the work adequately.

**Advantageous:** The proposed schedule provided indicates the proposer has more than adequately demonstrated their understanding of the project and the work required to complete a successful Comprehensive Plan and its timeframes for completion.

**Highly Advantageous:** The proposed schedule provided indicates the proposer has demonstrated their complete understanding of the project and will monitor and keep the project on schedule. The firm understands the time required to complete a successful Comprehensive Plan and has clearly demonstrated their process which will meet the requirements of the Town.

## 7. General Impression of Proposal

**Unacceptable** - The proposal was not responsive to the Comparative Evaluation Criteria in an acceptable manner.

**Not Advantageous** - Response is informative, meets the criteria for responsiveness. Reviewer feels proposal reflects that proposer can perform in a manner acceptable to the Town but was lacks details and demonstration of proposer's ability to meet project objectives.

**Advantageous** - Response is informative, meets criteria for responsiveness and communicates well. Reviewer feels proposal reflects that proposer can perform in a manner acceptable to the Town, and shows the proposer's commitment to the Town and the project.

**Highly Advantageous** - Response is concise, informative, and highly detailed. Proposal reflects that provider can perform in a manner acceptable to the Town, communicates well and shows the proposer's commitment to the Town and the project. The Selection Committee is confident in the provider's overall ability to provide and administer the services as required by the Town.

## C. Selection Process

### 1. Opening of Proposals

Following the deadline for the receipt of proposals, a Selection Committee appointed by the Town Administrator will open the non-price proposals and prepare a register of proposals submitted. The non-price proposals will be evaluated and scored by the Selection Committee based on the Minimum Requirements and Comparative Criteria contained in this RFP. If deemed necessary, the Selection Committee may interview one or more proposers as part of this process. The Selection Committee shall notify the Chief Procurement Officer which proposal was deemed most advantageous. The Committee will then open and evaluate the price proposals and recommend awarding the contract to the most advantageous proposal taking into account the evaluation criteria and price.

## **2. Rule for Award**

Any contract resulting from this RFP shall be awarded to the responsive and responsible Respondent offering the most advantageous proposal, taking into consideration all evaluation criteria and proposal prices. As used herein, the terms “responsive” and “responsible” shall have the meanings given to such terms under M.G.L. Ch. 30B, s.2. Any proposals containing a price that is abnormally low or high, as determined by the Town, may be rejected as not responsible.

## **3. Proposal Acceptance and Execution of Contract**

The Town will provide notice of acceptance of the successful Proposal by award letter which shall include a contract between the Town and the Respondent. This RFP, and the successful Proposal shall be incorporated into the final contract document. The Respondent shall deliver the contract duly signed and properly executed within ten (10) calendar days of receipt of the notice of acceptance. If the successful Respondent fails to execute the contract within such period, or within such period as extended by mutual agreement, the Town may accept another proposal.

## **4. Insurance**

See Article 14, Insurance, of the sample Contract for required insurance coverage and limits (Attachment “A”).

## **5. Indemnification**

The selected Respondent will be required to indemnify, defend, and hold harmless the Town of Stow, all of the town officers, agents and employees from and against all suits and claims of liability of every name and nature, including attorney fees and costs of defending any action or claim, for or on account of any claim, loss, liability or injuries to persons or damage to property of the Town or any person, firm, corporation, or association arising out of or resulting from any act, omission, or negligence of the Respondent, subcontractors, and their agents or employees in the performance of work covered by this Contract and/or their failure to comply with the terms and conditions of this Contract. The foregoing provisions shall not be deemed to be released, waived, or modified in any respect by reason of any surety or insurance provided by the Respondent under contract with the Town.

## **6. Public Records**

All Proposals submitted in response to the RFP are, following completion of the selection process, subject to disclosure under the Massachusetts Public Records Law, G.L. C. 66, s.10 and c.4, s.7, subsection 26. All reports and materials prepared by the Respondent will be public information and shall not be copyrighted.

## **7. Compliance**

In submitting a Proposals, a Respondent agrees that if selected, the Respondent will comply with all applicable federal, state, and local laws in its performance of a contract with the Town.

## **SECTION VI. REFERENCE DOCUMENTS**

The following additional documents are available to prospective Respondents and the selected Consultant(s) on the Town’s website at [stow-ma.gov/planning-board/pages/plans-studies-and-initiatives](http://stow-ma.gov/planning-board/pages/plans-studies-and-initiatives):

1. Planning Board Community Engagement Guidelines and Resources
2. 2010 Master Plan Update

# EXHIBIT A - Proposal Signature Page

Complete this page and return as a cover sheet for the completed technical proposal.

## Town of Stow RFP for Consulting Services for Comprehensive Plan Update

<b>Company Name</b>	<b>Contact Person</b> <i>(Please Print)</i>
<b>Street</b>	<b>Phone</b>
<b>City, State, Zip</b>	<b>Fax</b>

### Email

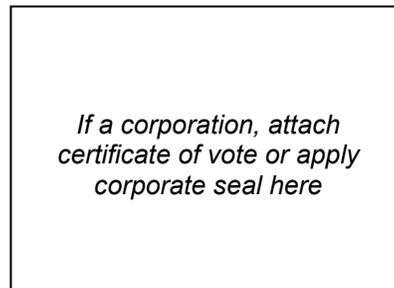
Submit the attached proposal for this Request for Proposals to the Town of Stow on the authority of the undersigned and as dated below. I confirm and pledge to abide by and be held to the requirements of this RFQ and its resulting contract, to perform any tasks and deliver any documents required, and to execute a Contract with the Town of Stow.

Proposer acknowledges receipt of the following addenda.\*

1. _____	2. _____
3. _____	4. _____

Authorized Agent of the Contractor:

<b>Signature</b> <i>(blue ink please)</i>
<b>Printed Name</b>
<b>Title</b>
<b>Date</b>



Form must be signed by a duly authorized officer(s) eligible to sign contract documents for the firm. Consortiums, joint ventures, or teams submitting proposals will not be considered responsive unless it is established that all contractual responsibility rests solely with one contractor or one legal entity. The Proposal must indicate the responsible entity.

Contractor should be aware that joint responsibility and liability will attach to any resulting contract and failure of one party in a joint venture to perform will not relieve the other party or parties of total responsibility for performance.

*\* to be filled in by Proposer, if addenda are issued.*

## ***EXHIBIT B*** – Certificate of Tax Compliance

Pursuant to Massachusetts General Law Chapter 62C, § 49A, I hereby certify under penalties of perjury that I have, to the best of my knowledge and belief, filed all state tax returns and paid all state taxes required under law.

***Social Security or Federal I.D. Number:***  
***Signature: Individual or Corporate Officer***  
***Date***

**Please Print**

Corporate Name:

Address:

P.O. Box:

City, State, Zip Code:

\* Your Social Security Number or Federal Identification Number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Proposers 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 M.G.L. Ch. 62C, § 48A.

**MUST BE RETURNED SIGNED WITH THE SEALED SUBMISSION**

***EXHIBIT C – Certificate of Non-Collusion***

***Chapter 30B, § 10***

"The undersigned certifies under penalties of perjury that this bid or 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."

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***Individual or Corporate Name of Proposer***

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***Signature of Authorized Agent***

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***Printed Name of Authorized Agent***

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***Date***

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**MUST BE RETURNED SIGNED WITH THE SEALED SUBMISSION**

***EXHIBIT D*** - Certificate of Authority

**MEETING OF BOARD OF DIRECTORS**

At a meeting of the Directors of the \_\_\_\_\_ duly called  
(Corporation)  
and held at \_\_\_\_\_ on the \_\_\_\_\_ day of  
\_\_\_\_\_, in the \_\_\_\_\_ year at which a quorum was present and acting, it was  
voted, that \_\_\_\_\_ the \_\_\_\_\_ of this Corporation  
(name) (title/position)  
is hereby authorized and empowered to make, enter into, sign, seal and deliver, on  
behalf of this Corporation a Contract for \_\_\_\_\_

\_\_\_\_\_  
(brief description)  
with the Town of Stow, and performance and payment bonds (each in the amount of the  
Contract) in connection with such Contract.

*I hereby certify that the above is a true and correct copy of the record, that said vote has not  
been amended or repealed and is in full force and effect as of this date, and that  
\_\_\_\_\_ is duly elected \_\_\_\_\_ of  
this Corporation.*

\_\_\_\_\_  
**Clerk or Secretary of the Corporation**

**MUST BE RETURNED SIGNED WITH THE SEALED SUBMISSION**