



Town of Pembroke
Request for Proposals
Comprehensive Master Plan

LEGAL NOTICE

MASTER PLAN

REQUEST FOR PROPOSALS (“RFP”)

The Town of Pembroke is seeking proposals from professional planning consultants for a **Comprehensive Master Plan**. The selected firm shall have demonstrated experience providing specified services for similar projects, preferably in Massachusetts. A complete RFP may be obtained, without charge, by contacting the Town Manager’s Office at 781-293-3844, email wchenard@townofpembroke-ma.org or on the Town Website at www.pembroke-ma.gov. Respondents to this request must familiarize themselves with the detailed RFP. Proposals are due to the Town Manager’s Office by Noon on May 25, 2022. Proposers must submit four (4) copies of their proposal and one digital copy. The Town reserves the right to reject any proposal deemed not to be in its best interest and waive minor technicalities.

I. BACKGROUND

The Town of Pembroke is charged with developing a comprehensive Master Plan to guide actions and decisions through the next 10-15 years. The mission is to produce a Master Plan in a manner that is transparent and open to all stakeholders. The Town expects an effort to provide a public process that is collaborative, cooperative, and coordinated with the goal of achieving consensus of the issues and implementation strategies.

Pembroke, MA is a south shore suburban residential community. Pembroke has a population of 18,790. Pembroke’s local government is led by a five-member Select Board and Town Manager. . Pembroke is traversed by several major routes including routes 3 and 13 in the northeast, routes 27 and 36 in the south, and routes 14 and 53. The Town is also accessible to MBTA Commuter Rail service in nearby Hanson, Halifax, and Kingston, and the MBTA Red Line in Braintree and Quincy.

The Town has an Open Town Meeting form of government, with a five-member Board of Selectmen and Town Manager. The Planning Board consists of seven members, who are elected by the town's voters and serve five-year terms.

Pembroke has traditionally been an agricultural and industrial community, but since World War II has become primarily a residential community providing housing for persons working in the greater Boston metropolitan area.

II. INTRODUCTION

The Town is soliciting Request for Proposals (RFP) from qualified professional planning consultants for a Comprehensive Master Plan. The selected firm shall have demonstrated previous experience in providing specified services to similar projects, preferably in Massachusetts. Qualified vendors are requested to submit their proposals to the Town Manager's Office, Pembroke Town Hall, 100 Center Street, Pembroke, MA, 02359 in accordance with the instructions contained within this RFP.

The Town will accept proposals delivered in person or by mail. All proposals must be received by Noon, May 25, 2022, to be considered. Proposals submitted by fax or by electronic mail will not be considered. All proposals must be submitted to:

Town Manager's Office
100 Center Street
Pembroke, MA 02359

The Town of Pembroke may cancel this RFP or reject in whole or in part any and all proposals, if we determine that cancellation or rejection serves the best interest of the Town of Pembroke.

III. PRE-PROPOSAL CONFERENCE/BRIEFING

There will be no pre-proposal meeting for this project.

IV. PROPOSAL SUBMISSION REQUIREMENTS

Submission of a technical and a price proposal is required. The price proposal must be sealed and submitted separately from the technical proposal. Proposals must be signed as follows: a) if the bidder is an individual, by her/him personally; b) if the bidder is a partnership, by the name of the partnership, followed by the signature of each general partner; and c) if the bidder is a corporation, by the authorized officer, whose signature must be attested to by the Clerk/Secretary of the corporation and the corporate seal affixed.

1. **Technical Proposal:** Four (4) copies of the technical proposal must be submitted in a sealed envelope clearly marked:

MASTER PLAN - TECHNICAL PROPOSAL

From: _____

The Technical proposal must contain the following information:

- (1) **Cover Letter:** A cover letter introducing the Consultant (firm) and the proposed Consultant team, including sub-consultants. The project manager and the name, title, address, and telephone number of the person with authority to negotiate and contractually commit to all services.

B. Table of Contents

- C. Statement of Project Understanding and Approach:** This statement should describe the Consultant's understanding of the project, and the Consultant's approach to the master planning process. Please include key steps in your response.

- D. Scope of Services:** A proposed scope of services that is detailed and responsive to the project as outlined in this RFP.
- The scope should be detailed by task.
 - It should be organized chronologically.
 - Tasks may overlap or run simultaneously.
 - Include estimated time required to complete each task.
 - The proposed scope should define what organizational support would be needed from the Town. Include milestones that the Town is expected to complete.
 - The scope shall specify the methodologies the consultant proposes to use for community outreach.
 - Regular meetings with the Board are to be included in the scope.
 - The Town's staffing resources are limited. The proposed scope should, to the extent necessary, define what organizational support would be needed from the Town.
 - The Master Plan work is funded through Pembroke Town Meeting appropriations and a grant from the Commonwealth of Massachusetts. The Town reserves the right to modify the proposed scope of services for instance and discuss points of emphasis.
 - The Scope of Services must be consistent with MGL c. 41.
- E. Consultant's Relevant Experience and Prior Performance.** Provide details of relevant experience and prior performance of the consultant on similar projects.
- F. Project Team:** Provide the resumes, and experience of all members of the project team.
- G. References:** Respondents shall provide at least four references.
- H. Ability to Perform:** Respondents shall disclose any other contracts or work that will limit or interfere with the respondent's ability to perform the Project in an expedient manner.
- I. Certificates:** signed certificates of non-collusion and tax compliance attached to this RFP.
2. **Price Proposal:** Four (4) copies of a complete and all-encompassing pricing proposal sheet are to be submitted. The price proposals must be submitted separately from the technical proposal, and sealed in a separate envelope marked:
- MASTER PLAN – PRICE PROPOSAL
- From: _____
- The price proposal must contain:
- A. Fee:** The detailed proposed fee for the project. The fee must include all project costs the Consultant expects to bill the Town including any reimbursable fees.
 - B. Fee Breakdown:** A breakdown of the professional service fees by each task and sub- task as shown in the Technical Proposal.
 - C. Hourly Rates:** The hourly rates to be charged by the Consultant for services performed by each team member.
 - D. Allowances:** Allowances for work elements such as additional meetings or surveys that the Town may also want to include shall be itemized separately. These optional work elements are to be broken out separately and not included in their proposed fee.
 - E. Price Assurance:** Consultants must agree to honor price quotes for 45 days.

Modification of Proposals

A Consultant may correct or modify a proposal by written notice received by the awarding authority prior to the receipt deadline. 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 receipt deadline, a consultant may not change any provision of the proposal in a manner prejudicial to the interests of the Town or fair competition. Minor errors will be waived, or the Consultant will be allowed to correct them. If a mistake and the intended proposal are clearly evident on the face of the document the mistake will be corrected to reflect the intended correct proposal, and the Consultant will be notified in writing; the Consultant may not withdraw the proposal. A Consultant may withdraw a proposal if a mistake is clearly evident on the face of the document, but the intended correct proposal is not similarly evident.

Withdrawal of Proposals

Proposals may be withdrawn prior to the time of receipt of proposals, only on written request to the awarding authority. No Consultant shall withdraw his proposal within a period of forty-five (45) days after the date set for the receipt of proposals.

Rule for Award of Contract

A contract will be awarded to the Consultant offering the most advantageous proposal, taking into consideration all evaluation criteria as well as price. The Town reserves the right to reject any or all proposals as it deems to be in the best interest of the Town.

Execution of Contract

The Town expects to execute a contract as expeditiously as possible. Upon the acceptance of selected consultant's submittal, the Town will incorporate into its Standard Contract, appropriate specifics for this procurement and submit the contract to the successful consultant for signing. In the event that the selected consultant fails, neglects, or refuses to execute the contract within a specified number of days after receiving a copy of the contract from the Town, the Town may at its option terminate and cancel its action in awarding the contract and the contract shall become null and void and of no effect.

Incorporated by reference into the contract which is to be entered into by the Town and the selected consultants pursuant to this RFP will be all of the information presented in or with this RFP and the consultant's response thereto, and all written communications between the Town and the successful consultant whose submittal is accepted.

V. QUESTIONS OR ADDENDUM

Questions concerning this RFP must be submitted in writing to: William Chenard, Town Manager, Pembroke Town Hall, 100 Center Street, Pembroke, MA 02359, or they may be emailed to wchenard@townofpembroke-ma.org. Questions/ inquiries must be received by Noon on May 18, 2022, to be considered. Questions/inquiries may be delivered mailed or emailed. Written responses will be posted on the Town's website (www.pembroke-ma.gov).

If any changes are made to this RFP, an addendum will be posted on the Town's website in and emailed. It is the sole responsibility of the bidder to ascertain the existence of any addenda and/or modifications issued by the Town.

The Town accepts no liability for and will provide no accommodations to bidders who fail to check for amendments and/or modifications to this RFP and subsequently submit inadequate or incorrect responses. Bidders may not alter (manually or electronically) the RFP. Modifications to the body of the RFP, Scope of Work, terms, and conditions, or which change the intent of this RFP are prohibited and may disqualify a response.

It is anticipated that the contract will be awarded as soon as possible after the submittal deadline.

VI. CONTRACTUAL PROJECT OVERSIGHT

Project Oversight will be exercised by the Pembroke Planning Board through the support staff. The Planning Board may appoint a Master Plan Subcommittee.

VII. CURRENT PROJECT GOALS AND STATUS

The goal of this planning effort is to develop a successful comprehensive Master Plan.

The Town has outlined the following priorities:

1. Present an overview of Pembroke, its demographics, its opportunities, and its challenges.
2. A Master Plan process that includes an extensive inter-active consensus building / mapping / public input process to assess where Pembroke wants to be in 10-15 years on all elements.
3. Details on how we will pay for what we want going forward.
4. Details on what metrics will be used to assess Pembroke's status and prospects.
5. A detailed and achievable implementation plan with recommendations, priorities, and schedule for implementation as well as different alternatives as applicable.
6. An itemization of capital improvement needs and priorities.
7. Capture and express the values of the Town in a form that encourages and supports those values.
8. Provide tools and guidelines for maintenance and enhancement of Town financial and economic status going forward including aids for decision making and policy development and execution.

VIII. SCOPE OF SERVICES

1. Conduct multiple visioning and feedback sessions with Town residents, Town staff, key stakeholders, and businesses to gain input for the Master Plan across numerous platforms to include public workshops and forums, small group interviews, stakeholder meetings, integrated social media, and/or surveys. The purpose of this visioning is to identify what and where Pembroke wants to be in ten to fifteen years and receive specific feedback on points of emphasis to address in the master plan.

2. Integrate, summarize, and coordinate results and feedback. Develop and produce a “Goals and Objectives” style report to present the initial feedback.
3. Develop a Master Plan characterizing and examining core elements and presenting a consensus-based vision and associated actions, per standards outlined in this RFP. The final Master Plan report will be a well-organized and succinct document with executive summary and a captivating display summary for use in various venues and events. The document should be easily read and understood by all decision makers and the residents of Town. It will contain – in appendices – detailed research findings, statistical data, analysis, and evaluation of survey responses or poll results, a description of the planning process, meeting notes, and back-up for prioritized recommended actions and initiatives.
4. The public outreach process is extremely important to the creation and implementation of this Master Plan. The consultant must have a proven track record in public outreach, who can provide professional and qualified facilitators to assist in public forums, and who have planning experience and cultural competency with similar communities. The scope of work shall include three different types of regular information exchanges:
 - Working sessions with the Board and other town committees as necessary
 - Regular updates to the Board
 - Public forums/workshops open to all residents

The town is open to suggestions from the consultants as to the frequency of these meetings and is open to alternative approaches such as a community-wide charrette in an attempt to get as much and as diverse public participation as possible.

5. Core Elements include, but are not limited to, those required by statute, plus any that rise to the surface during initial visioning:
 - A. Goals and Policies
 - B. Land Use, including Build-out Projection
 - C. Housing
 - D. Economic Development
 - E. Natural, Historic and Cultural Resources
 - F. Public Services and Facilities
 - G. Transportation and Circulation including provisions for bicycle and pedestrian infrastructure
 - H. Implementation Program
6. Develop and produce an executive summary that can be used as a separate document to outline key metrics and results of the Master Planning process.
7. Develop and produce visual/graphics to assist in conveying the consensus-based vision and associated action items. These visuals/graphics should be able to serve as stand-alone exhibits.
8. Identify specific actionable items, recommendations, responsible parties, and timeframe for implementation and Develop cost estimates for actionable items and recommendations.
9. Provide specific planning metrics, including the means for gauging trends, quantifying results, and projecting success, and a process for testing results over

time. Provide a gauge to meet these results, update goals, test the results, and plan for growth. Answer the question: “How do we measure success?”

10. Final Public Presentation.

11. Submit a timeline including milestones for the Master Plan process.

IX. MINIMUM QUALIFICATIONS

All consultants must possess the following minimum qualifications:

1. The consultant/team as well as the primary personnel preparing the Master Plan must have at least five (5) years’ experience in urban design, planning, public policy, management consulting, and/or architecture. At least one of the primary personnel shall be a certified planner, with AICP and/or other similar registration, or a master’s degree in Planning and one member of the team shall have experience with integrating sustainability into a community’s Master Plan.
2. The principal, project manager, and primary author to be assigned to this project must be available for meetings with the Town on days or evenings, as required.
3. The consultant/team must have previous experience in the management of public information processes and conducting municipal master plans. Completion by the consultant of two such projects in municipalities in Massachusetts within the last five (5) years is required, and completion of five overall is desired.
4. The consultant/team must have proven experience in the public sector and in working with federal, state, and municipal agencies and neighborhood/ business organizations.
5. The volume of the consultant's current and projected workload must not adversely affect its ability to immediately initiate work and to follow through with the project in a timely and professional manner. The consultant and all team members must be capable of devoting a significant amount of time to this project in order to complete the work within the schedule outlined in this RFP.
6. The consultant/team must have significant experience developing, facilitating, and implementing public participation techniques such as holding public, stakeholder, and neighborhood meetings, conducting key person interviews and developing citizen surveys.

X. COMPARATIVE EVALUATION CRITERIA

The Board will review all proposals to determine which contain all Proposal Submission Requirements and meet the Minimum Qualifications. Those that do not will be rejected. Those proposals that contain all Proposal Submission Requirements and meet the Minimum Qualifications may be asked for an interview and will be evaluated based on the following Comparative Evaluation Criteria:

- 1. Methodology.** Desirability of methodology and approach to be used in gathering public input and developing the Master Plan, as well as a demonstrated understanding of all project components and public outreach needs. Pembroke places a premium on the applicant’s approach to the project and the ability to present a program of services, which complies with the required Project Scope in a manner which is clear, concise, and complete with respect to required activities and elements. Pembroke values an approach that is innovative with respect to including unique or fresh methods of gathering input that is specific to the needs of Pembroke and that presents concepts

and conclusions that are easily understood and reflect a town consensus to the extent possible.

Highly Advantageous: 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: 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.

Not Advantageous: 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.

Unacceptable: The proposed plan of services is lacking in multiple aspects and thus does not adequately address the project objectives stated in the RFP.

- 2. Qualifications of Assigned Staff.** Staffing Plan, including the professional qualifications of all project personnel with particular attention to training, educational background, and relevant professional experience. Demonstrated expertise and experience of the principal in- Charge, Project Manager, and other key personnel, and any Consultants to be assigned to the Project, including relevant professional registration of the Consultants and their qualifications:

Highly Advantageous: The staffing plan is comprised of highly qualified individuals with significant relevant experience in most if not all disciplines significantly above and beyond the minimum applicant qualifications detailed in Section VI, “Minimum Qualifications”. The Consultant has an established track record working with their proposed team members.

Advantageous: The staffing plan is comprised of qualified individuals with relevant experience by at least the key personnel above and beyond the minimum applicant qualifications detailed in the “Minimum Qualifications” section.

Not Advantageous: The staffing plan is comprised of minimally qualified individuals for some of the key personnel as detailed in “Minimum Qualifications” section and/or is not sufficiently detailed to fully evaluate.

Unacceptable: The proposed staffing does not meet all the minimum applicant qualifications detailed in “Minimum Qualifications” section.

- 3. Experience:** Experience with similar projects, and prior experience with public contracts and relevant codes, laws, and regulations:

Highly Advantageous: The Consultant has at least five (5) years of experience consulting with municipalities on projects of similar size and scope to this project.

Advantageous: The Consultant has at least three (3) years of experience consulting with municipalities on projects of similar size and scope to this project.

Not Advantageous: The Consultant has less than three (3) years of experience but more than one (1) year consulting with municipalities on projects of similar size and scope to this project.

Unacceptable: The Consultant has less than one (1) year of experience consulting with municipalities on projects of similar size and

- 4. Ability and knowledge:** Ability and knowledge to serve as a resource to the Town as evidenced by direct involvement in (1) projects utilizing innovative zoning techniques, (2) projects utilizing public-private ventures or innovative economic development practices, and (3) projects utilizing mixed-use, smart growth revitalization strategies:

Highly Advantageous: Substantial involvement, i.e., lead consultant, in each of the three types of projects specified.

Advantageous: Involvement in each of the three types of projects specified.

Not Advantageous: Involvement in at least two of the three types of projects specified.

Unacceptable: Involvement in no more than one of the three types of projects specified.

- 5. References:** Strength and credibility of client references. Prior client satisfaction with working relationship, project management capabilities, and technical expertise in developing similar projects:

Highly Advantageous: More than three clients who consider your services satisfactory or better.

Advantageous: Three clients who consider your services satisfactory or better.

Not Advantageous: Three or more clients not all of whom consider your services satisfactory or better.

Unacceptable: Fewer than three clients who consider your services satisfactory or better, or three or more clients who consider your services unsatisfactory.

- 6. Budget and Schedule:** Demonstrated ability to meet project budget and project schedule.

Highly Advantageous: All of the Consultant's references indicate that the projects were completed within budget and on schedule or with minimal, insignificant delays.

Advantageous: One of the Consultant's references indicates that the project was not completed within budget attributable to the Consultant or with substantial delays attributable to the Consultant, and no current project or project completed in the last three years experienced substantial delays attributable to the Consultant.

Not Advantageous: Two of the Consultant's references indicate that the project was not completed within budget attributable to the Consultant or was completed with substantial delays attributable to the Consultant, and no current project or project completed in the last year experienced substantial delays attributable to the Consultant.

Unacceptable: More than two of the Consultant's references indicate that the project was not completed within budget attributable to the Consultant or was completed with substantial delays attributable to the Consultant

- 7. Pembroke:** Familiarity with the Town of Pembroke:

Highly Advantageous: Very familiar with the Town of Pembroke.

Advantageous: Some familiarity with the Town of Pembroke.

Not Advantageous: Little familiarity with the Town of Pembroke.

Unacceptable: Unfamiliar with the Town of Pembroke.

ATTACHMENT A CERTIFICATE OF NON-COLLUSION

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

Signature of person submitting contract/bid

Date

Name of Business

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.

Signature of individual submitting bid or proposal

Name of business

ATTACHMENT B STATEMENT OF TAX COMPLIANCE

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the

best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Tax Identification Number _____

Signature _____

Corporate Seal (if required)