# MASSACHUSETTS PLANNING

A publication of the Massachusetts Chapter of the American Planning Association



American Planning Association **Massachusetts Chapter** 

reating Great Communities for All

Spring 2025

# Smart Growth in Action: Mansfield's Blueprint for TOD

-

+

Ц

μ

page 3





#### 2024–2025 APA-MA Chapter Committees and Liaisons

*Click on any name below to reach our board members by email.* 

Executive Board

President | Alison LeFlore, AICP Vice President | Kenneth Comia, AICP Immediate Past President | Peter Lowitt, FAICP Secretary | Jim Robbins Treasurer | Lee Pouliot, AICP, ASLA Legislative and Policy Officer | Ralph R. Willmer, FAICP Professional Development Officer | Bill Nemser, AICP, LEED AP

#### **R**EGIONAL REPRESENTATIVES

Northeast Region | Brian Creamer, AICP, SITES AP Southeast Region | Shayne M. Trimbell, AICP Central Region | Trish Settles, AICP Western Region | Ben Breger, AICP At-Large Rep | Sarah L. Raposa, AICP Greater Boston Region | Claire V. Ricker, AICP

#### CHAPTER SUBCOMMITTEES

APA-MA Chapter Manager Brian Currie, AICP

Citizen Planner Training Collaborative (CPTC) Liaison Jacquie McPherson, AICP

Community Development & Housing Committee Chair Judi Barrett

**Executive Office of Housing & Livable Communities** Elaine Wijnja, AICP

Economic Development Committee Chair Kathy McCabe, FAICP

**Consulting Planners of Massachusetts (CPM) Liaison** Kathy McCabe, FAICP

**Massachusetts Association of Planning Directors Liaison** Kristina Johnson, AICP

Massachusetts Planning Editor Peter Lowitt, FAICP

Social Coordinators Alyssa Sandoval, AICP Melisa Tintocalis

Sustainable Development Committee Chair Jeanette Tozer, AICP Brian Creamer, AICP, SITES AP

Transportation Committee Chair Travis Pollack, AICP

*Massachusetts Planning* is published quarterly by the Massachusetts Chapter of the American Planning Association (APA-MA). © 2025 APA-MA. Contributions are encouraged. Please send submissions, letters, questions, and high praise to editor Peter Lowitt, AICP, at **peterlowitt1@gmail.com**. Advertising inquiries: **jmcommunications@comcast.net**.

www.apa-ma.org • Follow us on X at @APA\_MASS and on LinkedIn (click to launch in browser)

Cover: Station Square Apartments, Mansfield, MA.

#### From the President

Spring is in the air! I know we're still a few days away from "true" spring, but it's here friends! As we all come out of our collective hibernation, I want to give a special thanks to our



social committee and Movie and Meetup volunteers for pulling off another fun movie event — this time in Woburn! We're always looking for new places to host our signature Movie and Meetup event, let us know if you have an idea.

PDO Bill Nemser's expanded AICP Prep course is underway but there are still opportunities to join a session – or more! – if you're planning to take the AICP exam in the coming year. The course is only offered once a year, so join now even if you're looking to take the exam in November.

It goes without saying that these are difficult, uncertain times for all of us. It goes without saying that these are difficult, uncertain times for all of us. We will continue to be a friendly and inclusive place for planners to network and build community even as we know things are changing by the moment.

We will continue to be a friendly and inclusive place for planners to network and build community even as we know things are changing by the moment. Please continue to post and share jobs, many of our friends are looking for new opportunities. If there is anything we can do to support you as we navigate this uncertainty, please do be in touch. We are stronger together.

If you'll be in Denver for NPC, please come say hi at our New England Chapter's Social Sunday evening (cosponsored by APA-MA, CCAPA, RIAPA, NNECAPA, and MIT DUSP). RSVP here: https://tinyurl.com/ 439zaedu.

Please enjoy this edition of *Massachusetts Planning*. We are always seeking volunteers to write for the magazine and/or volunteer for other chapter activities. This is an election year, so there will be multiple opportunities to join us on the Chapter's Board. We are also about to update our chapter's strategic plan. Stay tuned for more information later this spring!



Alison LeFlore, AICP president@apa-ma.org

# **Smart Growth in Action: Mansfield's Blueprint for Transit-Oriented Development**

by Laura Smead, AICP



s municipalities across Massachusetts grapple with the requirements of the MBTA Communities Act, Mansfield has emerged as a leader, proactively adapting its zoning regulations to promote transit-oriented development. By leveraging existing initiatives,



fostering public engagement, and collaborating with planning experts, the town has successfully updated its zoning framework to align with its Master Plan, Housing Production Plan, and state requirements.

#### **A Vision for Transit-Oriented Development**

Even before the passage of the MBTA Communities Act, Mansfield had been laying the groundwork for transit-friendly growth. In 2014, the town established the Mansfield Station Revitalization Overlay District (MSROD), aimed at fostering mixed-use, pedestrianfriendly development near the commuter rail station. Despite its forward-thinking approach, the district saw limited revitalization, prompting local officials to revisit and refine their strategy.

#### **Strategic Zoning Updates**

Recognizing the need for a more effective framework, Mansfield launched a comprehensive review of the MSROD in 2022. This initiative sought to enhance market feasibility, meet the new state requirements (MBTA Communities Act), and align with the objectives outlined in the town's Master Plan and Housing Production Plan. A key element of the update involved increasing allowed heights and density by-right and expanding the zoning district westward along Oakland Street to the Chocolate Factory, increasing the available space for transit-oriented development.

#### **Community Engagement and Expert Collaboration**

A cornerstone of Mansfield's success has been its commitment to public engagement. Between 2022 and *continued next page* 

#### Smart Growth in Action cont'd

2024, the Planning Board facilitated four public workshops and incorporated feedback from 18 additional Planning Board meetings. Consulting firm JM Goldson assisted in portions of this overall engagement effort. This inclusive approach ensured that the revised zoning regulations reflected community priorities.

#### **Design Guidelines and Analytical Assessments**

JM Goldson played a pivotal role in guiding Mansfield through the complex regulatory landscape, organizing discussions, and conducting in-depth analyses of potential zoning revisions. Additionally, the team conducted rigorous compliance model testing, economic feasibility analyses, and fiscal impact assessments. These evaluations confirmed that the proposed zoning modifications were both practical and financially sustainable, striking a balance between growth and fiscal responsibility. Their expertise helped ensure that the proposed changes were not only legally compliant but also feasible and aligned with the town's long-term vision.

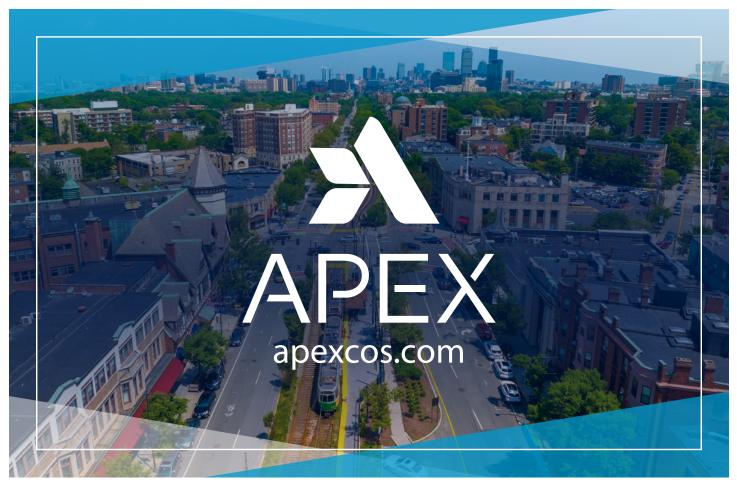
To maintain Mansfield's character while accommodating new development, the town implemented comprehensive design guidelines. These covered critical elements such as site layout, building materials, and architectural aesthetics, ensuring that future projects integrate seamlessly with existing development. "The Mansfield Planning Board has been shepherding the TOD concept for over a decade and the synergy created by the MBTA Communities Act was mutually beneficial. Multiple public engagement methods helped residents understand the historic density that exists in the area as well as the opportunity to centralize and incentive growth and redevelopment."

 Sarah L. Raposa, AICP, Director of Planning & Development

#### **Outcomes and Future Prospects**

In 2023, Mansfield successfully updated the MSROD zoning bylaw, and in 2024, the district expansion was formally approved at the Town Meeting. These updates facilitate higher-density housing and mixed-use development near the commuter rail station, fostering a vibrant, walkable neighborhood. The anticipated benefits include attracting younger residents, offering downsizing opportunities for seniors, and stimulating economic investment in the downtown area.

continued next page



# Smart Growth in Action cont'd

Mansfield's journey underscores the importance of strategic planning, community engagement, and expert collaboration in adapting to evolving housing regulations. By proactively updating its zoning regulations in compliance with the MBTA Communities Act, the town has positioned itself as a leader in smart, transit-oriented development. As other municipalities follow suit, they can look to Mansfield as a blueprint for balancing growth, sustainability, and community interests.

#### Key Takeaways for Other Municipalities

Mansfield's experience offers valuable insights for *continued next page* 



Mansfield Station (center) and surrounding transit-oriented development area.

# J M G O L D S O N

EMPOWERING PEOPLE. CREATING COMMUNITY.

#### HOW CAN YOU BE SURE TO:

HAVE A TRULY INCLUSIVE PLANNING PROCESS THAT BRINGS PEOPLE TOGETHER AROUND A SHARED VISION?

> RESHAPE YOUR LOCAL LAND USE POLICIES TO PROMOTE GREATER EQUITY?

#### FOSTER A SUSTAINABLE BALANCE BETWEEN GROWTH AND PRESERVATION?

CONTACT JM GOLDSON

Together, we can create an inclusive community planning process and promote just local policies that provide open and equitable access. It's about creating a world where all people live in healthy, sustainable, and safe communities.

Let's make positive change together!



GAGEMENT



COMPREHENSIVE & LONG-RANGE PLANNING



Established 2006 | Boston, MA | www.jmgoldson.com

## Tighe&Bond

# Supporting communities today by planning for the future.

Comprehensive Planning Urban Design & Planning Landscape Architecture Structural Engineering Environmental Science Transportation Planning Public Engagement

Local Comprehensive Planning, Brewster, MA Supporting the town's strategic visioning, GIS mapping of critical resources, stakeholder engagement to build public consensus, development of a targeted action plan.

www.tighebond.com



#### Smart Growth in Action cont'd

other communities navigating similar zoning changes:

- Leverage Existing Plans: Utilizing frameworks like the MSROD, Master Plan, and Housing Production Plan helped build trust and ensure continuity in development goals.
- **Prioritize Public Engagement:** Regular workshops and meetings provided residents with a voice in shaping zoning changes.
- **Collaborate with Experts:** Partnering with planning consultants facilitated a smoother, more informed regulatory process.
- **Diversify Engagement Strategies:** Combining in-person and virtual meetings expanded community participation.
- **Conduct Thorough Analyses:** Economic, feasibility, and compliance studies ensured that proposed changes were both beneficial and implementable.

- Laura Smead, AICP, is Senior Community Planner for Land Use and Long-Range Planning for JM Goldson. She brings over 15 years of combined planning and research/ analysis experience. Laura's previous planning work includes land use and zoning, community engagement, public health, ArcGIS mapping, and climate change. She is also experienced in grant writing, data collection, research, and statistical analysis. The big issue behind her efforts is how to make more sustainable and healthy places. In a volunteer capacity, Laura has served on Sharon's Master Plan Steering Committee and Master Plan Implementation Committee. She holds a Masters in Urban and Environmental Policy and Planning from Tufts University, a Masters in Psychology from California State University Fullerton, and a Bachelors of Applied Science in Psychology from the University of Minnesota Duluth.





Planning | Civil Engineering | Transportation Engineering Structural Engineering | Land Surveying | Green Infrastructure | GIS

www.nitscheng.com



With offices along the East Coast, we **transform ideas into solutions** that unite people under a vision of a more sustainable and equitable community.

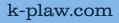
www.vhb.com/planning-and-design/ Engineers | Scientists | Planners | Designers 30+ locations along the East Coast

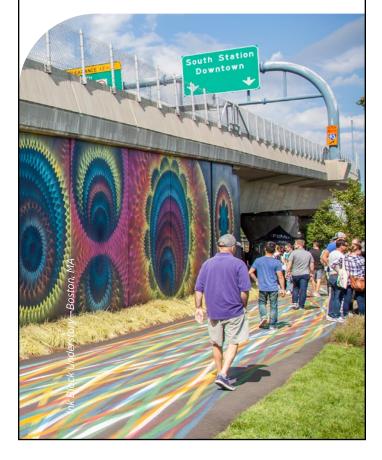
## Local focus. Statewide perspective.











# Somerville's 90 Washington Street Redevelopment Demonstration Project — How A Clever Public/Private Scheme Has Backfired

by William Valetta

en years ago, Somerville's planners began work on a scheme to build a new police headquarters and fire station as part of a public/private, mixed-use, and transit-ori-



ented development. The instrument they chose for planning, project finance, and contractual structure was an Urban Renewal "Demonstration Project." This was a method that had not been used before in the Commonwealth, but it appeared to be authorized by the Urban Renewal Law, *MGL Chapter 121B, Section 46(f)*.

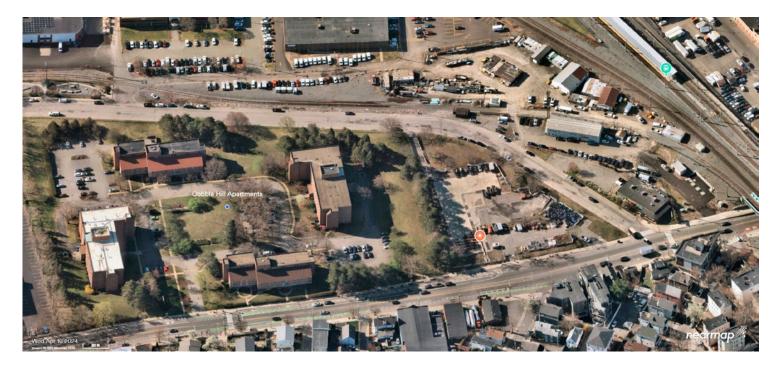
To advance the project, in 2019 Somerville's Redevelopment Authority took by eminent domain a four-acre parcel, close to the construction site of the new East Somerville Green Line T station. The city tendered a payment of \$8.78 million but the landowner challenged the actions. In April 2021, after hearings and appeals, the Massachusetts Supreme Judicial Court ruled that a "Demonstration Project" was a valid mechanism that the city could apply. *Cobble Hill Center v. Somerville Redevelopment Authority (SJC-13028 – 22 April 2021)*  This ruling allowed the city to continue planning while a further jury hearing went forward to decide the amount of compensation. In May 2023, the jury found that the fair market value of the four acres was \$35.3 million. The city appealed, arguing that the jury had been given extraneous and prejudicial evidence on the city's motivation in appraising the land. But on October 16, 2024, the Court of Appeals rejected these claims and ordered the city to pay the full amount with accrued interest. *Cobble Hill Center v. Somerville Redevelopment Authority, Massachusetts Appeals Court* #23-P-1353

Mayor Katjana Ballentyne has now determined that the public safety facility project will not go forward. On January 29, 2025, she declared that the city will rezone the land for conventional mixed-use redevelopment and then put it up for sale. A separate process will determine how to modernize the police headquarters on its present site or somewhere else.

#### **Lessons to be Learned for Planning Practice**

This failed Demonstration Project offers several lessons for urban planners. It reveals a *continued next page* 

90 Washington Street site.



#### 90 Washington Street cont'd

weakness of the public/private redevelopment concept, overall, as well as several specific mistakes of methods and process.

Somerville's planners were eager to accomplish "smart growth" by siting a multi-purpose project near the T-station, expecting it to generate vibrant, pedestrian activity. The combined public/ private investments would generate substantial property value gains, which would be shared to offset the public costs. The challenge of integrating the multiple uses would encourage creative design. In particular, it could realize a public safety facility that would be citizen-friendly, rather than defensive or military-style.

Unfortunately, by trying to crowd all of these goals and expectations into one modest-scale project, Somerville's planners pushed beyond their capacity. They overburdened a routine project with complexity, exaggerated expectations, and clever gimmicks, which undermined its legal validity and economic feasibility.

# What were the elements of the demonstration project planning?

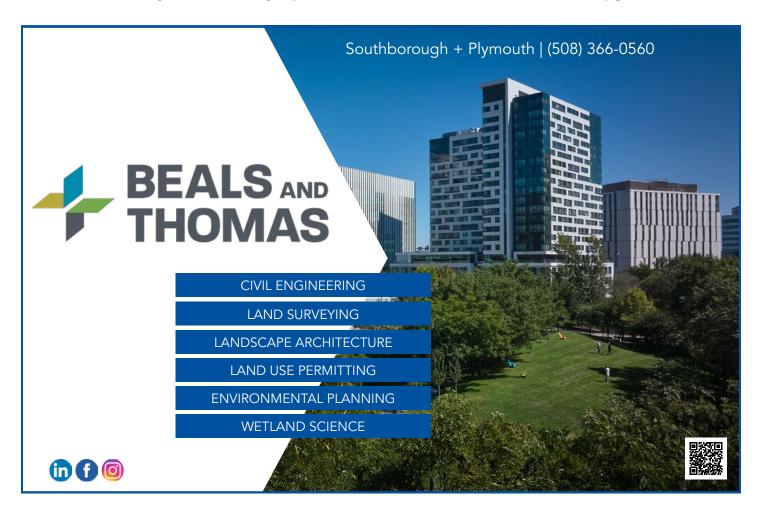
At the start, the city's Capital Projects and Economic Divisions organized an inter-agency technical group to define the program of public safety needs, including a police headquarters, district fire station, and community use spaces. The combination of functions would require about 70,000 sf of new space, to be incorporated into a mid-rise mixed residential/commercial development. Their work was advised by the city's Racial and Social Justice Department, to insure a citizen-friendly design concept.

The Somerville Redevelopment Authority (SRA) was designated to prepare the demonstration plan, seek a designated developer, and carry out the legal, contractual and business dealings. A Citizens Advisory Commission was organized to provide citizen and "stakeholder" input to these actions.

As the design and spatial arrangement concepts evolved, they were made the subject of a digital citizen survey poll and multiple public meetings and events.

What the planners did not do was to begin any of the Planning Board, ZBA and City Council actions, which ultimately would be required to define the development potential of the four-acre site. These would all be done in the future, after the negotiation of a project with a designated developer. Unfortunately, by trying to crowd all of these goals and expectations into one modestscale project, Somerville's planners pushed beyond their capacity.

continued next page



#### 90 Washington Street cont'd

#### How did these elements of planning process backfire and leave the city in a weak position in the courts and in dealings with potential developers?

First, by choosing the method of a "demonstration project," the planners avoided the time and effort of creating a full redevelopment plan. But, as a result, they did not compile a substantiating record of the problems and solutions that the project was going to demonstrate. The Supreme Judicial Court did not find this deficiency to be a reason to reject the city's authority to use the "demonstration project" instrument, but the court did issue a warning:

... future demonstration projects pursuant to Section 46(f), which will be undertaken with the benefit of this opinion...should identify with more specificity the unique and innovative nature of the demonstration. *Cobble Hill v. Somerville Redevelopment Authority, SJC* (2021) at page 23

Second, the court's warning proved to be insightful. When the city sent out a Request for Qualifications to 18 potential developers, asking them to explain how they could integrate the public facility uses with private elements, the responses were negative. Only three developers responded and each explained that the design and methods of construction for standard residential and commercial spaces would be very different Despite ten years of planning, at the end of 2024 the 90 Washington project still lacked a defined program, a conceptual design, and an agreed upon scale, from which an accurate estimate of market value and costs could be made.

than for the public uses. They would function incompatibly and, instead of cost savings, their combination would give rise to extra costs.

Third, the multiple mechanisms of planning/project committees with parallel citizen engagement led to complexity and indecision. The Citizens Advisory Committee held 17 meetings over two years to produce the output of (i) draft terms and conditions for the RFQ; (ii) an evaluation report on the three responses from interested developers; and (iii) an unfinished draft RFP to select a designated developer from among the three. In normal practice, RFQ and RFP documents follow templates and can be drafted by a junior planner in a couple of hours, and then presented for public comment at a meeting or two.

Finally, the most significant mistake made by the planners was the clever idea in 2019 to designate the 90 Washington parcel for "Civic Use" on the zoning map. This action removed from the land all "by right" uses and *continued next page* 



1. PSB 2021 Design 24% Voter Approval

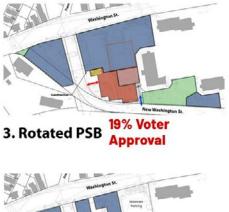




2. Washington St. Park 42% Voter Approval



5. Trees Preservation 28% Voter Approval





6. Parking Preservation 9% Voter Approval

7. NONE OF THE ABOVE: 28% Voter Approval

#### 90 Washington Street cont'd

development parameters. It was done in order to give the city and "community" maximum discretionary control and negotiating leverage with the future developer(s). But by failing to reasonably zone and clarify the development potential of 90 Washington, the planners enabled the court and jury to base their estimation of "fair market value" on an open-ended potential. The Appeals Court stated:

...The verdict was the result of multiplying the square foot value of the highest value comparable sale by the highest number of square feet that the Cobble Hill's parcel could be used for. ...Cobble Hill v Somerville Redevelopment Authority, Court of Appeals #23-P-1353, at page 11

The court explained that the jury had looked to the record of a recent sale of a nearby, two acre parcel, which was zoned Commercial Industrial and allowed "by right" a bio-tech laboratory of 200,000 sf. If the 90 Washington Street parcel had kept the moderate scale residential/business zoning classification, which it had before 2019, then the jury would have been directed only to comparable residential and retail or office project sites.

#### Conclusion

Despite ten years of planning, at the end of 2024 the 90 Washington project still lacked a defined program, a conceptual design, and an agreed upon scale, from which an accurate estimate of market value and costs could be made. Time had been ticking away with design and construction costs steadily inflating, interest rates failing to fall, and the costs of carrying a vacant site accumulating. In this context, Mayor Ballentyne correctly decided to cut losses and hope that most of the \$35 million land cost can be recovered in a straightforward auction of the land under a standard zoning designation.

- Bill Valletta has been a member of APA since 1979. He worked for the New York City Planning Department until 1994 and then spent 22 years as a as an international aid consultant, specializing in urban redevelopment and land tenure reform projects. He retired in 2017 and has since been observing and commenting on planning issues in his hometown of Somerville. Bill served as a volunteer member of the Citizens Advisory Committee for the 90 Washington project.



Proudly supporting Massachusetts municipalities for 100 Years! 617.282.4675 www.fando.com

Massachusetts
---------------

Rhode Island

Vermont

## transform your environment



Jim Riordan, LEED®AP (Certified MVP Provider) 800.SAMPSON • westonandsampson.com Offices in MA, CT, and along the East Coast

an employee-owned compan

# Weston & Sampson

## improving the communities where you live, work & play

- strategic, comprehensive, and master planning
- land use, zoning, and environmental management policy
- hazard mitigation and climate resiliency planning
- stormwater, wastewater, watershed, and environmental planning
- community outreach and inclusive engagement
- conservation and open space planning
- neighborhood and district area planning
- corridor, small-area, and transportation planning
- historic preservation planning
- research, mapping, and data visualization
- grant and funding assistance
- peer review
- permitting assistance



## Traffic Data Collection Services Covering Massachusetts & Connecticut

- Machine ATR Counts
- Turning Movement Counts
- Video Mid Block Counts
- Bike/Ped/Micromobility Counts

## **Over 30 years of experience. Any job size. Accurate traffic data at an affordable rate.**

TSTDAta.com 
610.466.1469 
jvetterlein@tstdata.com







## **The PDO Corner**

by Bill Nemser, AICP, MA Chapter PDO

ello to everyone! Spring is just around the corner...right? At their last meeting, the APA-MA Board voted to provide



complimentary Chapter membership for volunteer members of Planning or Zoning Boards! This new wrinkle is intended to further promote education to all those who are involved with the planning/zoning/land use/regulatory, etc. processes. Most importantly, it represents an acknowledgement by APA-MA that the more informed, up to date, and knowledgeable, the denizens of the planning community are, the more effective we all can be. And now in what seems to be a rather, umm...tumultuous era, an agent of change needs all the help they can get.

In this same vein, while prepping for the APA-MA Exam Prep Series currently underway, I did a deep dive into the APA National website. Usually I can find most of what I need on the Chapter site (I especially love the Chapter's "Guidebook to Massachusetts Land Use" which I find an invaluable tool). I was astounded by the sheer number of available educational resources now available on the National website. I always knew there was plenty there, but this recent search really showed me that variety of material APA members can access at no (or very little cost). Anyway, if you haven't had a chance to research it, here are some of the available materials you have access to:

- Planning Magazine (APA)
- Podcasts
- Archived articles by topic & links to other resources
- Knowledge database
- APA policy guidebooks
- Applied research sponsored by the APA
- APA instructional or topic driven videos
- APA blog

And don't forget the Planning Webcast Series that as an APA-MA member, you have free access to.

OK, so maybe I get a little excited over this type of thing. Sort of like when I discovered that my credit card included benefits I was paying for somewhere else or that by showing my AAA membership card I could save a hundred bucks on Bruins tickets. You get it: it's a good thing to know about!

There is no question: to do our jobs as professionals, we all must stay abreast of all the latest developments and changes that are going on. Look, I get it: as life becomes busier, and free time seems increasingly scarce, who the heck feels like brushing up on their professional reading after a long day (and possibly, night)? Well, I have a confession: despite serving as your Chapter Professional Development Officer, I don't always feel like slogging through a gazillion different planning publications to find what I may be interested in or need to know about at the time.

Nonetheless, after some deliberation I have concluded that by knowing where the information is, and being able to quickly access it, I am a lot more likely to engage in some select study and choice reading.

As always, please remember, your Chapter is committed to providing our members the very best educational opportunities we can. Educational programming that will enhance and maintain the outstanding pool of talent at APA-MA and help our Chapter to stand out not only in the area we serve, but nationally.

Feel free to reach out with any questions or comments to pdo@apa-ma.org.

# CPM CPM

Providing Expertise for Communities Supporting Private Sector Planners Directory of Planning Consultants

www.consultingplanners.org

## What could we create if we worked together?



Newburyport, MA | www.innesassocltd.com info@innesassocltd.com



## **NEWS FROM CPM | Consulting Planners' Perspective**

by Kathleen "Kathy" McCabe, FAICP, Vice-President, Consulting Planners of Massachusetts

# **Tips for Better RFPs**



he quality of your RFP – Request for Proposal – makes a difference in the number and quality of proposals your municipality receives. Here are some suggestions on how to make your RFP more interesting and effective in securing proposals from consultants. In Massachusetts



Chapter 30B governs the procurement of planning services. All contracts over \$50,000 for planning services must be procured by an RFP process. It is optional to use the 30B process for consulting services between \$10,000 and \$49,999. The RFP process enables municipalities to use qualifications and proposal quality criteria to choose the right consultant for a planning assignment.

**Develop a Procurement Process Calendar** for your procurement process detailing time for municipal and planning board reviews, authorizations, and approvals, along with time for advertising, for pre-proposal meetings, questions, RFP release, receipt of proposals, review of proposals, selection, award, and contracting. A procurement calendar is a useful tool. The procurement process can easily take four to six months from concept to project start. Allow enough time.

**Provide Adequate Time to Respond**. Typically provide a four-week window from release of the RFP to the deadline for responses. Larger and more complex projects often require additional time — six weeks or more to prepare a thorough response. A two-week

## Get the Word Out — Send Your RFP to CPM for Posting!

Consulting Planners of Massachusetts will list your RFP for FREE. CPM routinely sends notices to our consultant members about available RFPs. Send your RFP advertisement to TreasurerCPM@aol.com. window often is insufficient time for prospective proposers to see the RFP notice, request a copy of the RFP, prepare a response, and ship it to the municipality.

**Deadline and Submission Time** should enable easy use of overnight delivery services. Afternoon submission deadlines are typically better, easily enabling overnight delivery by either FedEx, U.S. Postal Service, or UPS.

**Copies**. Clearly state the number of copies to be submitted. A frequent error in many RFPs is contradictory information within the RFP on the number of copies to be submitted. Reproduction and printing can be expensive and the demand for multiple copies can discourage responses. Consider using online digital submissions. Two digital procurement services used by communities in New England are: GoBonfire and BidNetDirect. Requiring submission of a single "thumb" drive for additional copies for Planning Board or Selection Committee members in lieu of additional paper copies. Requiring a single digital copy can help reduce paper use and expense. State how many copies of the technical proposal are needed and the number of copies needed for the price proposal-it may be different.

**Page Limits**. Reasonable page limits for the narrative responses to approach and project understanding can be helpful to all. Page limits should be paired with font size directions. *No* page limits should be issued for resumes and project sheets.

**Scope of Work** is where the municipality sets forth its expectations for specific tasks and deliverables. The description of the tasks and deliverables should be clearly written and not ambiguous. RFPs should allow for some flexibility for consultants to describe their approach on how they would undertake a specific task and apply their creativity. As part of the scope of work, it is helpful for municipalities to set forth the minimum number of meetings required and the type of meeting. This helps all respondents to have a common understanding to better prepare a budget response.

**Schedule**. Include a schedule in the RFP indicating the prospective start and end dates. If there is a hard

#### News from CPM cont'd

end date due to funding, please state. Any flexibility as to schedule should also be noted. Make sure that the schedule allows for proper data collection if your project has a seasonal aspect to it, e.g., traffic impacts on schools or beaches, or if you have a seasonal population.

**Include Budget or Range in the RFP**. It helps consultants when responding to an RFP to know the level of effort expected by the municipality based on available funds. Mentioning the budget level helps avoid receiving proposals that all exceed the budget, necessitating re-issuance of the RFP. A frequent challenge consultants face is a budget that is too small to support the level of outreach and meetings requested and the time needed to do the technical work required.



Sarah Raposa, Director of Planning & Development, Town of Mansfield, and Kathleen "Kathy" McCabe, principal of McCabe Enterprises, chatting before the CPM session on Drafting an Effective RFP for Planning Services at the 2025 CPTC conference.



Above and right: Attendees of the Consulting Planners of MA session, Drafting an Effective RFP for Planning Services, on Saturday, March 15, 2025 at the Citizen Planner Training Collaborative (CPTC) conference held at Holy Cross College. (Credit for all photos: CPM)

**Evaluation Criteria** needs to be clearly specified and should not preclude qualified respondents. The criteria in the proposal are the criteria that are the basis for awarding the planning assignment. If the municipality intends to interview, the interview should be included in the criteria.

**Forms**. Copies of all required forms should be included with the RFP. The RFP should state whether the forms are to be submitted with the proposal or at the time of the award. It is also helpful to specify if the forms are to be submitted with the Technical Proposal or with the Price Proposal, and whether sub-contractors need to complete the forms.

**Contract**. Do include a copy of the proposed contract as an appendix to the RFP.

**Insurance**. Right-size insurance requirements to the scope of work and budget. It can be helpful to think and talk through the potential risks related to a proposed planning assignment, so that reasonable

continued next page



Above, right to left: CPM President Leonardi Aray, Managing Principal of Leonardi Aray Architects LLC, Kathleen "Kathy" McCabe, and Sarah Raposa, discussing how to draft an effective RFP.



#### News from CPM cont'd

insurance requirements are specified. Insurance requirements should be specified in the RFP, and submission of Certificates of Insurance should be required with the proposal or at time of Award. Do not copy and paste insurance requirements from a construction project. Construction projects have a different risk profile than planning projects. It is reasonable to expect planning consultants to carry a \$1 million general liability insurance, as well as professional liability insurance, and workers' compensation policy.

**Proofread**. Following all internal reviews and comments, proofread the RFP once again before advertising and posting. Consultants often find contradictory information within an RFP that spell-check does not correct. A final proofread can often minimize the need for future addenda and clarifications.

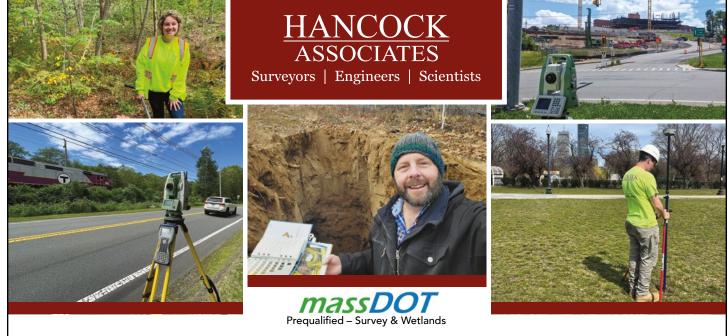
**Pre-Proposal Meetings and Question Periods** can provide useful opportunities for municipalities to familiarize consultants with their project and answer questions.

continued next page

#### **Good RFP Checklist**

- ✓ Cover Page
  - Project Name and RFP #
  - Contact Person with Contact Information
  - Date of Pre-Proposal Conference and/or Question Deadline
  - Submission Deadline Date and Time
  - Delivery Address for Proposal Submission, including room & floor #
  - Number of Copies Required to be submitted
- Outline of the RFP Structure
- Scope of Work with specific services, tasks, deliverables, and information as to meetings and public engagement expectations
- ✓ Desired Expertise
- 🗸 Budget
- Client team and contact person
- ✓ Availability of municipal staff to assist which tasks and level of effort
- Specialized requirements licenses, certification, insurance, DBE, MBE/WBE/VBE, local preferences
- Project schedule (including any flexibility)
- Project background (include links or access information to key plans or reports)
- ✓ Submission requirements
- ✓ Evaluation criteria
- Required forms
- ✓ Sample contract
- ✓ Map of project area (optional)

# SPRING PLANNING SHOULD START WITH



Infrastructure Design | Landscape Planning | Rail Trails & Bike Paths Commercial Site Design | Multi-Unit Residential Design | Roadways & Bridge Surveys 978-777-3050 | HancockAssociates.com | Established 1978 | 🛈 🛈 🕲 Boston, Chelmsford, Danvers, Marlborough, Newburyport and Palmer, MA | Concord, NH

#### News from CPM cont'd

**Interviews**. The potential for interviews should be stated in the RFP. Ideally the RFP also mentions the date of interviews for top ranked proposers. A municipality should short-list and interview the highestranked proposals. Consultants appreciate a one-week notice for an interview. The interview panelists should be consistent and present at all interviews. For public meeting interviews, municipalities should provide a waiting area for consultant teams that is beyond hearing distance of the interview area.

**Evaluate Proposals & Interviews**. Use the proscribed criteria in your proposal to evaluate. It is helpful to prepare a committee evaluation worksheet in advance of the interview and proposal review.

**Follow Up**. All proposers should be notified as to the proposal award, and whether or not they were selected. Some consultants may request a debrief to gain insight into the selection and evaluation processes. Debriefs are not a challenge to your decision, but rather a consultant looking to learn how to be more responsive. Debriefs can benefit both the municipality and the consultant in the long run. Good RFPs take time to prepare. Well written and thoughtful RFPs tend to garner more responses enabling communities to select the right consultant for a particular planning assignment. Consultants want to respond and work for municipalities. Good RFPs help both the municipality and the consultant community.

For more information about 30B Procurement, consult The Chapter 30B Manual: Procuring Supplies, Services and Real Property, issued by the Office of the Inspector General. See: www.mass.gov/ oig-public-procuremente.

NAING FOR VEORDABLE HO

### **Become an Advertising Supporter!**



## THIS SPACE COULD BE YOURS!

Support your local APA Chapter and reach more than 1,100 planning professionals with your branded message! See the **rate sheet** for more information or contact Jeff Mills at jmcommunications@comcast.net or (860) 454-8922 with any questions.



## **COMMUNITY PLANNING**

& NEIGHBORHOOD DEVELOPMENT ZONING & REGULATORY REFORM HOUSING POLICY & PLANNING DEVELOPMENT IMPACT ANALYSIS TECHNICAL ASSISTANCE

BARRETT PLANNING GROUP LLC | 350 LINCOLN STREET, SUITE 2503 | HINGHAM, MA 02043 | 781.934.0073 WWW.BARRETTPLANNINGLLC.COM



## **MOVIE NIGHT!**

On Friday, March 14, filmmaker David Heilbroner, writer, producer and director of the film Martha's Vineyard vs. DeSantis, spoke to planners remotely at the **Planners' Cinema & Social Event** at The Brickyard in Woburn.

About the film: "In September 2022, Florida Governor Ron DeSantis used an undercover recruiter to lure 49 Venezuelan migrants onto the island of Martha's Vineyard with a false promise of jobs and housing a stunt which fueled a political and media firestorm. Martha's Vineyard v. DeSantis tells this story through the personal lens of four migrant cousins who now live on the Vineyard, and the lead attorneys and Texas sheriff who are aggressively fighting back against DeSantis and his cronies."





Planners socialize and enjoy food and libations at the Planners' Cinema & Social event.

