



Request for Proposals

Update/Revisions to Training Curriculum Modules Citizen Planners Training Collaborative (CPTC)

Introduction

The Citizen Planner Training Collaborative (CPTC) is a collaboration of the Massachusetts Department of Housing and Community Development (DHCD); UMass Center for Agriculture, Food and the Environment; Massachusetts Association of Regional Planning Agencies (MARPA); the Massachusetts Chapter of the American Planning Association (MA-APA); Mass Audubon, and the Massachusetts Association of Planning Directors (MAPD), along with citizen and professional planners.

CPTC's mission is to empower land use officials to make effective and judicious decisions in the areas of development, transportation, natural resources and the environment by providing educational opportunities, access to information and resources, and by enhancing cooperation among and integration of land use boards within local government. CPTC works with a network of highly qualified professionals to provide training opportunities around the state and throughout the year, including:

- Workshops held throughout the State in October & November
- Annual Conference Training Sessions held in March
- On Demand Training Workshops
- Online Training Workshops

CPTC offers Level I (Introductory) and Level II (Intermediate) Certification for participants who complete a specific menu of courses (listed in Appendix A) offered at training opportunities throughout the year, including at the annual conference.

In addition, the Massachusetts Interlocal Insurance Association (MIIA) offers credit under the MIIA Rewards Program towards public officials' liability insurance for municipalities with representatives attending courses specifically designated "MIIA Credit".

Project Description/Deliverables Sought

CPTC, through its Board of Directors, is requesting proposals from qualified vendors for the development of updated/ revised training modules for a series of a minimum of thirteen (13), 1.5-2 hour workshops (listed in Appendix A) tailored towards an audience of members of Planning Boards and Zoning Boards of Appeal, municipal land use officials, staff, and members of other land use related boards and commissions. This list includes the core courses that count towards CPTC certification as well as several others which, together, comprises CPTC's standard yearly curriculum. Course descriptions, along with selections from the current training material, are attached.

Some of these modules have been recently updated, while others need more substantial revision. CPTC will work with the selected vendor or team to identify key areas where changes are required.

Given the range of subject matter, and the desire for a uniform product, we are seeking a single vendor or a consultant team with the capability and subject area expertise to develop the entire curriculum as a single uniform, attractive, package of training modules.

Each module typically lasts 1.5-2 hours, and should include PowerPoint presentation, and associated handouts, including a bibliography or references as needed. Module format should be easily replicable for use for possible future courses offered in response to current need and demand (for example a course on developing an Adult Use Recreational Marijuana Zoning By-Law).

All course materials should be visually engaging and clear, and use a consistent format and layout. Course materials should be developed for use by a variety of different instructors as needed and be adaptable for use at on-demand training, public training workshops, conferences, and, ultimately for on-line delivery.

CPTC will be the sole owner of all material produced through this work effort. Final products will be provided to CPTC in electronic format that can be edited as necessary.

Project Schedule

Due to the wording of the supplemental budget appropriation that provides the funding for this project, the budget available for this project must be fully expended by June 30, 2019. All work must be completed by that time to be eligible for reimbursement. There will be no exceptions.

January 25, 2019 RFP Issued

February 15, 2019 Responses Due (5:00 PM)*

March 4, 2019	Vendor Selection Announced (after vote CPTC Board Meeting 3/1/19)
Week of March 4	Initial Meeting with Vendor
May 1, 2019	Interim draft of all material submitted to CPTC for review
May 10, 2019	Initial Review by CPTC Complete
June 21, 2019	Final Material Submitted

* Note that if necessary, CPTC may decide to conduct interviews with potential vendors between February 20, 2019 and February 27, 2019.

Submission Process

Proposals should include the following

1. A letter of interest describing the proposed project approach, and clearly identifying the Project Manager who will act as the primary point of contact with CPTC
2. Qualifications of Project Team and Personnel
3. Detailed scope of services and schedule for completion of work
4. A fee proposal for each module, with the total budget not to exceed \$70,000

Questions – contact Ralph Willmer, CPTC Chair, rwillmer@mapc.org; 617.933.0734

(Between 2/4/19 – 2/8/19, please contact Katy Lacy, CPTC Board member, klacy@mhp.net, 857.317.8514

Proposals should be submitted electronically (no hard copies required) to:

Ralph Willmer, CPTC Chair

rwillmer@mapc.org

All proposals due by the 5:00 PM on Friday, February 15, 2019.

Selection Criteria

- Project team’s relevant subject area expertise and familiarity with CPTC training programs and goals;
- Experience developing and delivering training material suitable for the target audience;

- Evidence of strong graphic, written, and verbal communication skills;
- Proven ability to meet deadlines, and a commitment to required completion date of June 30, 2019;
- Project fee, though this is not determinative.

Appendix A: List of Training Modules to be Update/Revised

Creating Master Plans

How to Hold a Perfect Public Hearing

Introduction to the Subdivision Control Law & ANR (Level I)

Introduction to the Zoning Act (Level I)

Planning with Community Support (Level II)

Reading a Plan

Roles and Responsibilities of Planning and Zoning Boards - Part 1 (Level I)

Roles and Responsibilities of Planning and Zoning Boards - Part 2 (Level I)

Site Plan Review

Special Permits & Variances (Level II)

Vested Rights and Non-conforming Structures, Lots and Uses (Level II)

Writing Reasonable and Defensible Decisions (Level I)

Zoning Exemptions (Level II)

Note that the core curriculum is divided into Level I - Introductory, and Level 2 - Intermediate.

Level I

The Roles and Responsibilities of Planning Boards and Zoning Boards of Appeals

Introduction to the Subdivision Control Act (including Approval-Not-Required (ANR) Lots)

Introduction to the Zoning Act

How to Write Reasonable and Defensible Decisions

Level II

Planning with Community Support

Non-Conforming Structures, Lots and Uses and Vested Rights

Zoning Exemptions and Protected Uses

Special Permits and Variances