



**TOWN OF TRURO**

24 Town Hall Road, P.O. Box 2030  
Truro, MA 02666

**REQUEST FOR PROPOSALS  
FOR  
MASTER PLANNING SERVICES, WALSH PROPERTY**

The Town of Truro publishes its solicitations, attachments and addenda online. These are available for viewing and download at the following address:

<https://www.truro-ma.gov/home/pages/bids-proposals>

**Town of Truro**  
24 Town Hall Road, P.O. Box 2030  
Truro, MA 02666

**Notice of Request for Proposals**

Master Planning Services, Walsh Property

May 30, 2022

The Town of Truro seeks proposals from qualified vendors (firm or team) with blended expertise in the areas of site planning and design, transportation planning, real estate development, meeting facilitation, and community engagement, to create a Master Plan for the Town-owned parcels known as the Walsh Property.

This Request for Proposals (RFP) has been issued pursuant to Massachusetts General Law Chapter 30B, Uniform Procurement Act, and all stages of the selection process will be governed by that Act. The RFP and related information may be obtained beginning May 30, 2022 by contacting Darrin Tangeman, ICMA-CM, Town Manager, Town of Truro, at [dtangeman@truro-ma.gov](mailto:dtangeman@truro-ma.gov).

Responses to this RFP require separate Technical Proposals and Price Proposals, each submitted in separate, sealed envelopes. Failure to comply with this and other submission requirements described herein may result in a Proposal being considered nonresponsive.

Proposals as described within should be submitted to Darrin Tangeman, Town Manager, Town of Truro, 24 Town Hall Road, P.O. Box 2030, Truro, MA 02666, **no later than 4:00 p.m. on June 24, 2022**, with an electronic copy of the Technical Proposal to [dtangeman@truro-ma.gov](mailto:dtangeman@truro-ma.gov). Late proposals will not be accepted.

The Town of Truro reserves the right to reject any or all proposals which are not responsible and/or responsive, in whole or in part, as deemed in the best interests of the Town, in accordance with G.L. c. 30B, Uniform Procurement Act.

**1. Introduction**

The Town of Truro is seeking proposals from a professional firm or team with blended expertise in the areas of site planning and design, transportation planning, real estate development, meeting facilitation, and community engagement, to create a Master Plan for the Town-owned parcels known as the Walsh Property. This is the first phase of a multi-phase development project, and the Town seeks to be an active partner in the Master Plan phase as well as subsequent phases of the project.

**2. Decision to use RFP Process**

Pursuant to 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 master planning services for the approximately 70-acre Walsh Property. The RFP process will enable the Town to provide higher ratings to consultants who have significant experience providing similar master planning services to other municipalities or private clients at the scale required.

**3. Anticipated Schedule for Procurement of Services**

RFP issued: .....May 30, 2022  
Proposals due: .....June 24, 2022, 4:00 p.m.  
Proposals opened .....June 27, 2022  
Interviews and evaluation of Technical Proposals.....June 30 – July 8, 2022  
*Note, the Town reserves the right to extend this period as needed.*  
Selection of Proposal and Notice of Award.....July 15, 2022

**4. Scope of Services**

The Town is seeking services for the creation of a Master Plan for the Walsh Property. The Scope of Services is contained in Appendix 1.

**5. Contract and Contract Term**

After selection of the most advantageous Proposal, as determined through the process described below, a written contract shall be executed by the successful Respondent and the Town. The Town anticipates a start date no later than September 1, 2022, and the term of the contract is anticipated to be through May 1, 2023.

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

If it becomes necessary to revise any part of this 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 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.

## **7. Questions**

Questions and/or requests for clarification must be submitted in writing via email to the Chief Procurement Officer at [dtangeman@truro-ma.gov](mailto:dtangeman@truro-ma.gov). All responses to such questions or requests (together with the questions/requests themselves) will be posted on the Town's website as addendum to the RFP and will be incorporated into the RFP. Respondents who have requested and received a copy of the RFP will be notified of such addenda by email. Please check the Town website for addenda before submitting a Proposal to the Town.

## **8. 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 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 (June 30, 2022). This provision shall be specifically referenced within a submitted Proposal.

## **9. Submission Requirements**

### **A. Technical Proposal**

One original and nine copies of the Technical Proposal shall be submitted in a sealed envelope which is marked: "Technical Proposal – Master Planning Services, Walsh Property, submitted by [name of Respondent]." An electronic copy of the Technical Proposal shall be sent to [dtangeman@truro-ma.gov](mailto:dtangeman@truro-ma.gov). The Technical Proposal must not contain any reference to price. The Technical Proposal must include the Contents specified in Section 18 below.

### **B. Price Proposal**

A Price Proposal shall be submitted in a sealed envelope which is marked: "Price Proposal – Master Planning Services, Walsh Property, submitted by [name of Respondent]." The Price Proposal must contain a fee schedule identifying the proposed cost for each phase of the Master Planning project (see Scope of Services, Appendix 1).

### **C. Delivery Address**

Proposals shall be delivered or mailed to the following address:

Darrin Tangeman, ICMA-CM, Town Manager  
Town of Truro  
24 Town Hall Road  
Truro, MA 02666

All proposals must be received no later than 4:00 p.m., local time, on July 1, 2022. 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 proposals will not be accepted.

#### **10. Town's Reservation of Rights**

The Town of Truro reserves the right to cancel this RFP, or to reject all proposals, should such action be in the best interest of the Town.

The Town of Truro reserves the right to modify this RFP as needed to serve the interests 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.

#### **11. 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 Proposal may be amended so as to prejudice fair competition or the Town of Truro. A request for withdrawal must be in writing.

#### **12. Opening of Proposals**

Technical Proposals will be opened on the date and time specified above and the names of Respondents will be read and recorded. Technical Proposals will be opened privately and their contents will not be disclosed to the public or competing Respondents until the evaluation process is complete. A register of Proposals will be compiled; this register may be reviewed upon request.

#### **13. Evaluation of Technical Proposals and Interviews**

The evaluation of Technical Proposals will be conducted by an Evaluation Committee. The judgment of the evaluators will be based upon the evaluation criteria set forth in this

RFP.

The Evaluation Committee may interview qualified, responsive and responsible Respondents. Respondents whose submittals do not meet the minimum requirements will not be interviewed. There is no entitlement to an interview. The Town reserves the right to extend the time during which interviews may be undertaken.

#### **14. 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 G.L. c. 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.

#### **15. 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.

#### **Insurance**

The selected Respondent will be required to obtain and maintain, at its own expense, general liability and motor vehicle liability insurance policies in connection with any operations included in the contract and shall have the Town of Truro listed as an additional insured on such policies. Workers' compensation insurance, in accordance with the requirements of Massachusetts law, will also be required if applicable. Insurance coverage and limits are included as part of Town of Truro contract terms and conditions.

#### **Indemnification**

The selected Respondent will be required to indemnify, defend, and hold harmless the Town of Truro, all of the Town officers, agents and employees from and against all suits and claims of liability of every name and nature, including attorneys 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 the work covered by this Contract and/or their failure to comply with 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.

## **16. Public Records**

All Proposals submitted in response to this 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 Selected Respondent will be public information and shall not be copyrighted.

## **17. Compliance**

In submitting a Proposal, 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 of Truro.

## **18. Contents of Technical Proposal**

Technical Proposals must provide the information necessary to demonstrate satisfaction of the Minimum Criteria set forth below, and the information necessary for assessment of the Proposal under the Evaluation Criteria set forth below. Technical Proposals should conform to the following format:

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
- be signed by a duly authorized representative of the Respondent

Profile: a description of the Respondent's company and services offered. If the Respondent is a team, a description of the relevant services provided by each company. The Profile should include:

- legal name of company and all contact information
- principal place of business and any local offices
- number of years in business and services offered
- representative clients and description of engagements completed over the past five years
- description of engagements completed or in progress similar to the one described in this RFP

Personnel and Statement of Qualifications: Please identify and describe the qualifications of the key personnel who will be responsible for providing services to the Town under contract. This should include, for each such person:

- description of specific credentials and experience

- number of years of experience providing relevant services
- description of experience providing services similar to those described in this RFP

Resumes or CVs may be included.

Approach to Work and Work Plan: Please describe how the Respondent plans to approach and complete the work described in each phase of the Scope of Services, including:

- facilitation of Walsh Property Community Planning Committee work
- public outreach and data gathering
- Master Plan development
- community adoption

A timeline should be included.

Work Sample: representative sample of master planning work completed by the Respondent.

***NOTE: in the interest of conserving resources, this may be provided by link to Respondent's website. The Town reserves the right to request printed copies of the Work Sample as needed.***

Additional Value Added Services: Please identify any value added services that the Respondent could provide to the Town (at no cost) in addition to those described in the Scope of Services. There is no requirement to do so, but such additional services may differentiate the respondent and improve the overall evaluation of the Technical Proposal

References: Please provide a list of all clients to whom the Respondent has provided services similar to those identified in this RFP since January 1, 2017, including name, contact information, and type of engagement. Respondents may, but are not required to use the Reference Sheet attached as Appendix 3.

Certifications: Please complete and sign the following Certifications attached as Appendix 2:

- Certificate of Non-Collusion
- Certificate of Corporate Authority
- Certificate of Tax Compliance

## **19. Evaluation Criteria**

### **A. Minimum Criteria**

Proposals must demonstrate satisfaction of all Minimum Criteria below. Proposals that do not demonstrate such satisfaction will not be further considered.



- Respondent must be an established business (corporation, partnership, firm, or other form of organization) that normally furnishes the services described in this RFP as part of its principal operations, or a team comprised of the same.
- The Respondent must have a minimum of five (5) years experience in providing master planning services to other municipalities.
- The Respondent must have completed at least three (3) projects similar to the project herein described for other municipalities.
- The project principal/leader must have provided similar services to at least three (3) other municipalities.
- The Respondent must be able to start work on the project within thirty (30) days of the award of the contract and must be able work continuously to complete the project within the time anticipated in this RFP or as reasonably extended.

**B. Comparative Evaluation Criteria**

Proposals that meet or exceed the Minimum Evaluation Criteria above will be evaluated and rated on the basis of the following Comparative Evaluation Criteria.

Ratings of Highly Advantageous (HA); Advantageous (A); Not Advantageous (NA) or Unacceptable (U) will be given to each of the criteria below for each Proposal. A composite rating will then be determined. An “Unacceptable” rating with respect to any of the criteria below may eliminate a Proposal from further consideration.

The following criteria will be used in the evaluation of Proposals:

**1. The overall applicable experience of the firm or team submitting the Proposal**

Highly Advantageous	Firm or team has more than 7 years’ experience in providing similar development services to municipalities.
Advantageous	Firm or team has between 5-7 years’ experience in providing similar development services to municipalities
Not Advantageous	Firm or team has less than 3-5 years’ experience in providing similar development services to municipalities
Unacceptable	Firm or team has less than 3 years’ experience in providing similar development services to municipalities

**2. Master Plan Development Experience**

Highly Advantageous	Firm or team has completed a master plan of the same scope.
Advantageous	Firm or team has completed a master plan of similar scope.
Not Advantageous	Firm or team has completed a master plan for a dissimilar project.
Unacceptable	Firm or team has no master planning experience relevant to this project.

**3. Description of Approach and Work Plan**

Highly Advantageous	The respondent proposes a thorough, detailed approach and work plan that will meet or exceed the minimum deliverables and provide a superior opportunity to identify issues and provide in-depth recommendations, direction, and advice.
Advantageous	The respondent proposes an approach and work plan that will meet or exceed the minimum deliverables and provide increased opportunity to identify issues and provide detailed recommendations, direction, and advice.
Not Advantageous	The respondent proposes an approach and work plan, but does not provide for Meeting the minimum deliverables or for providing a basis for recommendations and advice.
Unacceptable	The respondent does not provide an adequate approach or work plan.

#### 4. Ability to Perform

Highly Advantageous	The respondents' proposal provides for a detailed staffing, approach and work plan that supports all of the project requirements and logically leads to producing or exceeding the minimum deliverables required in the Scope of Services in advance of the required timelines.
Advantageous	The respondents' proposal provides for staffing, approach and work plan that is clearly defined and will lead to producing the minimum deliverables required in the Scope of Services in advance of the required timelines.
Not Advantageous	The respondents' proposal provides for staffing, approach and work plan, but does not clearly demonstrate the ability to meet the minimum deliverables required in the Scope of services in the timelines required.
Unacceptable	The respondent does not identify staffing, an approach or work plan to achieve the minimum deliverables required in the Scope of Services.

#### 5. Inclusion of Value Added Services

Highly Advantageous	Respondent proposes to include more than one additional, added value service providing determinable value or benefit to the Town.
Advantageous	Respondent proposes to include at least one additional, added value service providing determinable value or benefit to the Town.
Not Advantageous	Not applicable
Unacceptable	Not applicable

#### 20. Reference Documents

For convenience, a locus map and Assessor's map are contained in Appendix

Respondents are expected to review the following reports available on the Town's website:

Limited Environmental Site Assessment, June 18, 2019, prepared by BSC Group:

[https://www.truro-ma.gov/sites/g/files/vyhlf3936/f/uploads/walsh\\_way\\_truro\\_limited\\_site\\_assessment.pdf](https://www.truro-ma.gov/sites/g/files/vyhlf3936/f/uploads/walsh_way_truro_limited_site_assessment.pdf)

Environmental and Permitting Evaluation – Walsh Property Site Development Feasibility Assessment, January 7, 2022, prepared by Tighe & Bond

[https://www.truro-ma.gov/sites/g/files/vyhlf3936/f/uploads/walsh\\_property\\_site\\_development\\_feasibility\\_assessment\\_1-7-2022.pdf](https://www.truro-ma.gov/sites/g/files/vyhlf3936/f/uploads/walsh_property_site_development_feasibility_assessment_1-7-2022.pdf)

Walsh Way Property Assessment Report, Weston & Sampson:

[https://www.truro-ma.gov/sites/g/files/vyhlf3936/f/uploads/walsh\\_way\\_property\\_assessment\\_report\\_-\\_weston\\_sampson\\_3-2022\\_0.pdf](https://www.truro-ma.gov/sites/g/files/vyhlf3936/f/uploads/walsh_way_property_assessment_report_-_weston_sampson_3-2022_0.pdf)

Additional information on the Walsh Property and the Walsh Property Community Planning Committee can be found here:

<https://www.truro-ma.gov/walsh-property-community-planning-committee-0>



## Scope of Services

### Project Summary

The Town of Truro is seeking responses from a professional firm or team with blended expertise in the areas of site planning and design, transportation planning, real estate development, meeting facilitation, and community engagement, to create a Master Plan for the Town-owned parcels known as the Walsh Property. This is the first phase of a multi-phase development project, and the Town seeks to be an active partner in the Master Plan phase as well as subsequent phases of the project.

Purchase of the Walsh Property, comprised of contiguous parcels totaling 69.8+- acres east of Route 6 in Truro, was approved by Town Meeting in 2019. The Property was acquired for general municipal purposes. The Select Board appointed the Walsh Property Community Planning Committee to lead community outreach and make recommendations for potential uses of the Property.

In developing a Master Plan for the entire Walsh property, the Town seeks to plan coherently and creatively to meet current and future needs of the community for housing, recreation, open space, municipal services, and other public benefits.

The Town envisions the Master Plan phase of the project will be completed by February 2023, but consideration will be given to proposed work plans that conclude prior to or extend beyond this anticipated completion date.

### **Project Goals. It is anticipated that the Master Plan will consider the following:**

- housing opportunities for multiple needs and life stages, including but not limited to affordable, workforce, senior, transitional or seasonal housing
- a mix of developed and undeveloped areas that are creatively and environmentally integrated
- facilities and/or infrastructure to provide Town services
- opportunities for active and passive recreation (indoor/outdoor)
- potential for small-scale business, nonprofit, incubator, and shared workspace
- potential for renewable energy and other ecological and climate initiatives

- wastewater disposal and infrastructure
- coordinated access/egress from the property and internal circulation for a variety of uses
- the small town, coastal character of Truro

**Further Planning Objectives and Guidance. It is anticipated that the firm or team selected will:**

- Incorporate and build on the results of the Town-wide survey regarding preferences for use of the Walsh Property
- Work with Walsh Property Community Planning Committee (WPCPC) to conduct further outreach and research
- Consider Net Zero development principles
- Consider findings and strategies of the Town’s 2022 Housing Needs Assessment and Housing Production Plan (anticipated completion fall 2022); Economic Development Strategy; Local Comprehensive Plan process; and other planning documents
- Incorporate any findings/recommendations of Town Counsel with respect to existing and potential rights of access to property
- Conduct a collaborative, transparent process that provides opportunities for staff and stakeholder input that is fully compliant with the Massachusetts Open Meeting Law
- Recommend zoning changes to accomplish proposed uses and development of the Property
- Prepare strategy for marketing designated areas of site to qualified developers who will work collaboratively with the Town to realize community goals

**Project Phases and Deliverables**

The Master Planning process will result in a comprehensive strategy for uses of the Walsh Property, taking into consideration existing site conditions, land use regulations, feasibility of various uses, and goals/findings of a variety of relevant Town planning documents. The project should be envisioned in four phases: 1) Facilitation of the work of the Walsh Property Community Planning Committee; 2) Public outreach and data gathering; 3) Master Plan development;

and 4) Community adoption. The first phase identified, facilitation of WPCPC work, will overlap the other three (that is, run continuously through all subsequent phases of the project). The public outreach aspect of Phase 2 could also overlap with Phases 3 and 4 as the Master Plan is developed and marketed.

#### Phase 1: Facilitation of WPCPC Work

**Facilitate and staff WPCPC; engage with staff.** The firm or team will lead a participatory community process that builds on prior public engagement by the WPCPC. As part of this process, the firm or team will staff WPCPC meetings, which includes preparation of meeting agendas and minutes, and will maintain a calendar for project events. In addition, the firm or team will be expected to engage regularly with Town staff and Committee leadership to ensure ongoing collaboration and progress. The above meetings should occur as frequently as needed to obtain input, gain consensus, and complete the draft and final project plans.

#### Phase 2: Public outreach and data gathering

**Build on prior outreach and engagement.** The WPCPC has commenced public outreach (a community survey, conducted together with the Local Comprehensive Plan Committee and Housing Authority), and obtained preliminary data identifying community concerns and vision for the Walsh Property. The firm or team will build on these prior outreach efforts, with particular attention to reaching populations not represented or proportionately-represented in the community survey. The firm or team will gather and synthesize additional data to prepare an analysis of existing conditions and trends (e.g., demographics; land use). Coordination with other Town committees conducting outreach is expected.

#### Phase 3: Master plan development

**Land Use Recommendations and Conceptual Plan(s).** Incorporating the findings of Phase 2, and utilizing creative and dynamic planning techniques, the firm or team will develop a Master Plan consisting of three elements: a memorandum containing recommendations for site development and land use; a conceptual plan or plans; and a recommended phasing strategy and timeline.

##### **A. Site Development/Land Use Recommendations**

The firm or team will prepare a memorandum containing recommendations for site development and land uses for the Walsh Property in its entirety, including the following elements:

- Proposals for a variety of housing types serving needs identified in planning documents and through the Walsh Property community planning

process

- Proposals for active and passive recreational opportunities
- Identification of appropriate municipal uses/provision of Town services on the property
- Identification options for integrating economic and social opportunity into planning and development of the property
- Discussion of infrastructure development needs for water, wastewater disposal, broadband internet, electricity and cable, and transportation access
- An economic and community impact analysis for the proposed site development, to include:
  - fiscal impacts, including impacts on town services, tax base and employment
  - impacts on identified economic needs and opportunities,
  - impacts on identified community needs, including housing healthcare, family services and others
  - impacts on neighborhood
  - impacts on the natural environment
  - impacts on traffic flow and transportation safety
- Recommendations for zoning changes to accomplish proposed uses and development of the property
- Recommendations for incorporating solar and climate change initiatives into development of the property
- Recommendations for project delivery method options (e.g., ground lease, disposal, public-private partnership), including any combination of methods

**B. Conceptual Plan(s)**

The firm or team will prepare conceptual plan(s) corresponding to the above Site Development/Land Use Recommendations, and depicting the following:

- Suggested configuration of uses



- Compatibility of uses
- Types and number of structures for housing and other uses
- Municipal facilities
- Recreational facilities (indoor/outdoor; passive/active)
- Siting of walkways, roadways, access roads, utilities, entrances and exits to and from the property
- Parking layouts to accommodate intended uses, including accessible parking
- Stormwater retention and/or bio retention areas,
- Wastewater facilities(s) and/or components
- Pathways and gathering spaces
- Potential solar canopies, and/or rooftop solar, and electric vehicle charging stations

### C. Recommended Phasing Strategy and Timeline

The firm or team will prepare a recommended phasing strategy and timeline, providing a strategic path towards implementing future phases of the project. The strategy and timeline should take into account needs as prioritized by the Town; the housing and development climate; permitting; and potential grant funding.

#### Phase 4: Community adoption

The firm or team will present the Master Plan (memorandum, conceptual plan(s) and phasing strategy/timeline) to Town staff, the WPCPC, and the public. The firm or team is expected to engage and educate the community on the Master Plan in anticipation of a 2023 Town Meeting vote.

**Respondents are required, in preparing their Price Proposals, to provide prices for each of the four phases described in this Scope of Services.**

Respondents are encouraged to describe any additional services or information in their proposals that could be provided to the Town as part of this project at no additional cost. These additional value-added services may be used in our evaluation of responses to help differentiate respondent's proposals.

