

**REQUEST FOR PROPOSALS (RFP)**  
Economic Analysis of Industrial Zoning Districts  
RFP # 19-43

The Department of Planning and Community Development (DPCD) acting through the Town Manager is requesting proposals from qualified individuals and firms for Consulting Services related to performing an economic analysis of the industrial zoning districts in the Town of Arlington.

A copy of the RFP outlining the requirements for submission is available at the Town website [www.arlingtonma.gov/purchasing](http://www.arlingtonma.gov/purchasing).

For further information contact Jennifer Raitt, Director of Planning and Community Development, at 781-316-3092, or [jraitt@town.arlington.ma.us](mailto:jraitt@town.arlington.ma.us).

Proposals are invited and will be received by the Purchasing Officer, Town of Arlington, Massachusetts on or before 2:00 p.m., Thursday September 12, 2019 at the Town Manager's/Purchasing Office, Town Hall Annex 2<sup>nd</sup> floor, 730 Massachusetts Avenue, Arlington, MA 02476. Proposals delivered after the appointed time and date will not be considered. A briefing on the RFP and the scope of work is scheduled For Thursday August 29, 2019 at 9:00 a.m. in the 1st floor conference room, Town Hall Annex. All prospective applicants are encouraged to attend. Questions about the RFP may be submitted by 4:00 p.m. Wednesday September 4, 2019. Responses to questions, including those raised at the briefing session, will be sent to those requesting the RFP and posted online as addenda to the RFP.

Three (3) copies of technical proposal and a USB drive with the technical proposal in searchable PDF format shall be submitted in a sealed envelope marked "RFP #19-43 – Economic Analysis of Industrial Zones" and one (1) copy of the price proposal in a sealed envelope marked "RFP #19-43 – Economic Analysis of Industrial Zones - Price Proposal".

The Town reserves the right to cancel any request for proposals, and to reject in whole or in part any and all proposals, when it is deemed in the best interests of the Town to do so.

Adam W. Chapdelaine  
Town Manager

August 21, 2019

**REQUEST FOR QUALIFICATIONS  
ECONOMIC ANALYSIS OF INDUSTRIAL ZONING DISTRICTS  
AUGUST 21,2019**

**Responses Due:** September 12, 2019 at 2:00pm  
Late Responses Will Be Rejected

**Deliver Complete Responses To:** Town Manager  
Town Manager's/Purchasing Dept.  
Town Hall Annex 2<sup>nd</sup> floor  
730 Massachusetts Avenue  
Arlington, MA 02476

**For Further Information Please Contact:** Jennifer Raitt, 781 316-3092  
Email: [jraitt@town.arlington.ma.us](mailto:jraitt@town.arlington.ma.us)

RFP No. 19 –43

## **I. OVERVIEW/ PURPOSE**

The Town of Arlington, acting through its Department of Planning & Community Development (hereinafter referred to as DPCD), seeks proposals from consultants to complete an economic analysis of the Town's industrial zoning districts. Specifically, DPCD seeks the professional services from experienced firms qualified to complete an analysis of the existing land uses within the Town's current industrial zoning districts and to make recommendations that modernize the industrial zoning districts. It is expected that the consultant will work with DPCD and the Zoning Bylaw Working Group.

The project goals include:

1. Position Arlington to attract new businesses and jobs in emerging growth industries to the Industrial District; and
2. Create opportunities through which Arlington can realize greater revenue with strategic amendments to the Zoning Bylaw and Zoning Map.

This effort is funded through an appropriation from Town Meeting for Fiscal Year 2020 for a total of \$60,000.

## **II. BACKGROUND INFORMATION**

Arlington transformed into a streetcar suburb in the early to mid-20<sup>th</sup> Century and is now a densely developed vibrant community. Approximately 85% of the land area in Arlington is zoned residential and the remaining 15% of land is zoned open space, commercial, and industrial. Industrially-zoned land is about 1% of Arlington's land area (49 acres). The business and industrial districts are generally along the Massachusetts Avenue and Broadway corridors.

The Town is governed by a five-member Select Board and Representative Town Meeting. Daily management is vested in a Town Manager appointed by the Select Board. Planning and development is

controlled by Massachusetts General Laws (MGL), the Arlington Town Manager Act, the Town Bylaws, and the Arlington Zoning Bylaw. The Arlington Redevelopment Board (ARB) serves as both a planning board and urban renewal authority under MGL Chapter 40A and 121B, respectively. Four members of the ARB are appointed by the Town Manager with approval of the Select Board and one member is a gubernatorial appointee. The Zoning Board of Appeals is appointed by the Select Board. Both the ARB and the Zoning Board of Appeals act as special permit granting authorities as designated in the Zoning Bylaw. The Director of Inspectional Services serves as the Town's Zoning Enforcement Officer.

### **The Master Plan<sup>1</sup> and Implementation**

In May 2015, the Arlington Town Meeting voted to endorse the Arlington Master Plan, "Your Town Your Future" with approximately 75% of members voting in favor of the plan. The Master Plan set forth policy goals and strategies for the community. Over the years, the Town has begun to implement many of the plan's recommendations.

The Master Plan identifies the existing industrial district zoning as obsolete and in need of an overhaul. The Master Plan points out that today's industrial users have different needs now than in the past, including space needs and configuration as well as supporting business uses. Specifically, the Master Plan recommends removing the minimum floor area requirement for certain uses, allowing restaurants in the zoning district, allowing small retail spaces under 2,000 square feet to promote flexibility in redevelopment, and allowing residential uses to be built in mixed-use structures where the industrial/commercial uses comprise the majority of the space. The Master Plan suggests that since the Town does not impose a split tax rate, changes to the land use and density of the industrial zones may result in Commercial, Industrial, and Personal (CIP) taxes contributing to a larger share of the Town's overall tax base.

Implementation of the Master Plan recommendations is overseen by the Master Plan Implementation Committee (MPIC). Following the recodification of the Zoning Bylaw in 2018, the Town created a new subcommittee, the Zoning Bylaw Working Group (ZBWG), to address specific zoning recommendations identified in the Master Plan.

### **III. SCOPE OF SERVICES**

The Town of Arlington is seeking professional services to complete an economic analysis of the Town's industrial zoning districts and based on the analysis, make recommendations regarding potential amendments to the Zoning Bylaw. Generally, the scope of work should include the following tasks:

#### Economic Analysis

1. The consultant shall conduct background research, including reviewing available documents and data, in order to be familiarized with the industrial zoning districts. In particular, the Zoning Bylaw and the Master Plan, the Arlington Heights Neighborhood Action Plan, the Mill Brook Corridor Study, the Historic Preservation Survey Master Plan, the Arlington Arts and Culture Action Plan, and the Conservation Commission's bylaw and regulations should be reviewed.<sup>2</sup> This task should also include a kick-off meeting with DPCD staff.

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<sup>1</sup> <https://www.arlingtonma.gov/departments/planning-community-development/master-plan>

<sup>2</sup> These documents can be found on the Town's website: <https://www.arlingtonma.gov>. This list is not inclusive, and additional information can be provided by DPCD staff during the kick-off meeting.

2. The consultant shall identify representative industrial district uses, in consultation with DPCD staff, in order to assess the existing economic and fiscal benefit to the Town. The representative uses should reflect the range of current uses in the industrial district.
3. In order to develop zoning amendment recommendations, the consultant shall identify typical uses and/or consider varying use/development scenarios, and for each typical use and/or scenarios, assess the potential economic and fiscal benefit to the Town. The typical uses and/or scenarios shall be identified through consultation with DPCD staff as well as best practices from other similar communities.
4. The current and potential economic and fiscal impact study shall be presented to the ZBWG for feedback. Staff will present the draft to other town committees and share with the public for feedback to be incorporated in a final document.

#### Zoning Recommendations

1. Based on the outcome of the economic analysis, feedback from the ZBWG and DPDC staff and public input, and best practices, the consultant shall produce recommendations for amendments to the Zoning Bylaw relative to uses and dimensional and density requirements in the industrial zoning districts. The consultant shall also review the existing boundaries of the industrial districts and make recommendations as to whether making boundary changes, creating sub-districts, or other adjustments, could provide economic and fiscal benefit to the town.
2. If changes are warranted, draft and final zoning language and zoning map changes for consideration by the ZBWG and ARB shall be prepared. Staff will present the draft to other town committees and share with the public for feedback to be incorporated in a final document.

#### **Staff Role**

Town of Arlington staff, primarily from DPCD, will be closely involved, but the Consultant is expected to devote the time needed to conduct research, write documents, and participate in up to 3 meetings with the ZBWG and ARB. The staff will present information prepared by the Consultant at public forums and Town Meeting without the Consultant's attendance. Additionally, staff will take primary responsibility for scheduling meetings, posting notices for meetings, preparing meeting minutes, and attending all meetings. Staff will provide any reasonably necessary baseline data, the Zoning Map, the Master Plan and zoning audits, the General and Zoning Bylaws, and any other relevant materials in electronic format.<sup>3</sup>

#### **IV. PROJECT SCHEDULE**

Work is expected to start in the fall of 2019. The goal is to adopt amendments at a Town Meeting in 2020.<sup>4</sup> The Consultant shall prepare a reasonable timeline to complete the project.

#### **V. DELIVERABLES**

The Consultant will deliver two (2) copies of all reports produced, along with high-quality electronic copies of the same in a Microsoft Word compatible version and a searchable PDF version. All materials will become the property of the Town of Arlington.

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<sup>3</sup> Some older information may only be available in a hard copy format.

<sup>4</sup> Respondents should not assume that it is necessary to have potential amendments ready for the spring Annual Town Meeting.

## VI. CONSULTANT QUALIFICATIONS

At a minimum, the proposing firm/team must meet the following requirements:

1. The firm/project manager/team must have at least five (5) years of experience in economic and fiscal impact analysis and associated research related to industrial uses.
2. The firm/project manager/team must have at least five (5) years of experience in municipal planning or private sector planning, in particular industrial zoning, and community engagement with projects of similar size and scope.
3. The principal and project manager to be assigned to this project must be available for meetings with the Town on days or evenings, as required.
4. The firm/team must have previous experience in similar projects. Successful completion of a minimum of three (3) such projects within the last five (5) years is required, and completion of five (5) overall is desired.
5. The firm/team must have proven experience in the public and/or private sector and in working with federal, state and municipal agencies, and neighborhood/business organizations.
6. The volume of the proposed project managers and firm'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 firm and all team members must be current staff members and capable of devoting a significant amount of time to this project in order to complete the work within the schedule outlined in this RFQ.

## VII. SELECTION CRITERIA

The Town will award the contract to the Consultant offering the most advantageous response to this RFQ, taking into consideration all evaluation criteria. The selection process will include an evaluation procedure based on the criteria identified below. Finalists may be required to appear for an interview.

1. Staffing Plan, including the professional qualifications of all project personnel with particular attention to training, educational background, professional certification or registration, and 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 professional registration of the Consultants and their qualifications. The Plan of Services should be detailed and logical, and demonstrate efficiencies and creativity in completing the project.

**Highly Advantageous:** The plan of services proposes a detailed, logical, creative, and highly efficient scheme for producing a complete project that addresses all Goals and Priorities of this project and meets all the minimum applicant qualifications detailed in Section VI, "Consultant Qualifications".

**Advantageous:** The plan of services proposes a credible scheme for producing a complete project that addresses all of the required issues and meets all the minimum applicant qualifications detailed in Section VI, "Consultant Qualifications".

**Not Advantageous:** The plan of services is not sufficiently detailed to fully evaluate, or the plan does not contain all the components necessary to produce a complete project that

addresses all of the required issues and meets all the minimum applicant qualifications detailed in Section VI, “Consultant Qualifications”.

**Unacceptable:** The plan of services does not meet all the minimum applicant qualifications detailed in Section VI, “Consultant Qualifications”.

2. Depth of experience with similar projects in municipal planning or private sector planning, economic and fiscal impact analysis, and community engagement, and prior experience with relevant general and zoning bylaws.

**Highly Advantageous:** The Consultant has at least seven (7) years of experience consulting with municipalities or private clients on projects of similar size and scope to this project. The Consultant can demonstrate the successful completion of five (5) similar projects within the last five (5) years.

**Advantageous:** The Consultant has at least five (5) years of experience consulting with municipalities or private clients on projects of similar size and scope to this project. The Consultant can demonstrate the successful completion of three (3) similar projects within the last five (5) years.

**Not Advantageous:** The Consultant has less than four (4) years of experience but more than one (1) year consulting with municipalities or private clients on projects of similar size and scope to this project. The Consultant can demonstrate the successful completion of two (2) similar projects within the last five (5) years.

**Unacceptable:** The Consultant has less than four (4) years of experience consulting with municipalities or private clients on projects of similar size and scope to this project. The Consultant cannot demonstrate the successful completion of similar projects.

3. Strength and credibility of client references. The Consultant shall demonstrate 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.

4. Desirability of approach to the project, as well as a demonstrated understanding of all project components and public outreach needs.

**Highly Advantageous:** The response contains a clear, creative, and comprehensive plan that

addresses all project Goals and Priorities as stated in the RFQ.

**Advantageous:** The response contains a clear plan that addresses most of the project Goals and Priorities as stated in the RFP.

**Not Advantageous:** The response does not contain a clear plan to address many of the project Goals and Priorities as stated in the RFP.

**Unacceptable:** The response does not contain any plan to address the project objectives stated in the RFP.

5. 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.

## VIII. SUBMITTAL REQUIREMENTS

Interested qualified firms must submit its response addressing the objectives, scope and schedule described in this RFP. Responses must include, at a minimum, each of the following:

- Three (3) paper copies of the technical proposal and a USB drive with the technical proposal in searchable PDF format shall be submitted in a sealed envelope marked "RFQ #19-43 Economic Analysis of Industrial Zoning Districts - Technical Proposal".
  1. General description of the firm/team's experience.
  2. Description, with examples, of the firm/team's experience in working with municipalities or private clients to successfully implement zoning amendments.
  3. A detailed scope of services for the proposed work, including the firm/team's general approach to such work, evidence of the firm/team's understanding of the goals and objectives of the project, and methodology for accomplishing the tasks as listed in this RFP.
  4. An outline of the schedule for completion of tasks (timeline) as presented in the firm/team's approach to the scope of services.

5. Description of or resumes for the assigned staffs' experience, educational background, availability, and chain of responsibility, including the name and title of the principal and project manager assigned to the project, names of all sub-consultants, and resumes of all personnel to be associated with the project.
  6. At least three (3) references, including name, title, agency, address, description of project, project cost, and telephone number and the email address for clients with similar projects completed by the Consultant within the last five years (including dates).
  7. Other pertinent information about the firm(s) that would aid the Town in making a selection.
  8. Completed Required Forms.
  9. Evidence of insurance coverage, including general and professional liability and Workers' Compensation insurance.
- Sealed Submission, one (1) copy, clearly marked "RFQ #19-43 Economic Analysis of Industrial Zoning Districts - Price Proposal".
    1. Completed Price Proposal Form (attached)
    2. Estimated breakdown by task of professional service fees (including expenses), assigned project staff and hourly billing rates of all staff assigned to provide services (including any sub-consultants).

Proposals must clearly address all the submittal requirements; that is, the response should include a section addressing all of the minimum qualifications, the minimum submittal requirements, and each of the review criteria. The proposal will be reviewed based on each of these items and it will be to the benefit of the responder to clearly address each of the items. Where the requirements specify a minimum level of experience, indicate the dates of said experience.

A Selection Committee will be convened to review proposals. Committee members will be drawn from Town staff, ARB members, ZBWG members, and may include other community members.

The Town reserves the right to reject any or all proposals, to waive any non-material irregularities or information in any RFP, and to accept or reject any item or combination of items. The Town also reserves the right to seek additional information and revised proposals prior to selection of a Consultant through written notice to all of the respondents.

A Project Briefing Session to address Consultants' questions and provide access to relevant Town plans and studies will be held in the Arlington Town Hall on Thursday August 29, 2019 at 9:00 a.m. To confirm your attendance at the project briefing session, please contact Jennifer Raitt at 781 316-3092 or by email at [jraitt@town.arlington.ma.us](mailto:jraitt@town.arlington.ma.us). Questions and/or comments may be submitted to Jennifer Raitt, Director of Planning and Community Development at [jraitt@town.arlington.ma.us](mailto:jraitt@town.arlington.ma.us) / 781 316-3092 by 4:00 p.m. Wednesday September 4, 2019.

Responses to the RFP are due by **2 PM Thursday September 12, 2019**. Facsimile and/or emailed responses will not be accepted. All responses should be submitted to:

Adam W. Chapdelaine  
 Town Manager  
 Town of Arlington  
 730 Massachusetts Avenue



Arlington, MA 02476

Any interviews with prospective consultants will be scheduled in September 2019.

**IX. PROJECT FUNDING**

Consultants must complete the attached Price Proposal Form under separate cover. Project fees must be provided for each Project Component of work as described in the Scope of Services. Fees shown will include all costs and expenses (copying, mileage, photographs, maps, etc.) to complete the Scope of Services defined in this RFP. Also, the selected Consultant will be required to submit invoices identifying hours, expenses and total cost by specific tasks. The final contract scope, price and fee will be negotiated with the highest ranked responder.

**X. REQUIRED FORMS**

All required forms must be submitted with the proposal.

- A. Certificate of Non-Collusion
- B. Certificate of Tax Compliance
- C. Price Proposal Form

**CERTIFICATE OF NON-COLLUSION FORM  
TOWN OF ARLINGTON  
ECONOMIC ANALYSIS OF INDUSTRIAL ZONING DISTRICTS**

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 Individual Submitting Bid or Proposal

\_\_\_\_\_  
Name of Business

\_\_\_\_\_  
Date

BY STATE LAW THIS NON-COLLUSION FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

**CERTIFICATE OF TAX COMPLIANCE FORM**  
**TOWN OF ARLINGTON**  
**ECONOMIC ANALYSIS OF INDUSTRIAL ZONING DISTRICTS**

Pursuant to MGL Chapter 62C, Section 49A, I certify under the penalties of perjury that I have complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

\_\_\_\_\_  
Social Security Number or  
Federal Identification Number

\_\_\_\_\_  
Signature and Title of Individual or  
Responsible Corporate Officer

BY STATE LAW THIS CERTIFICATE OF TAX COMPLIANCE FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

**PRICE PROPOSAL FORM  
(To be place in a separate sealed envelope)**

**RFP #19-43 Consultant Services  
TOWN OF ARLINGTON  
ECONOMIC ANALYSIS OF INDUSTRIAL ZONING DISTRICTS  
Arlington, MA 02476**

CONTRACTOR     Town Manager  
                    Town of Arlington  
                    730 Massachusetts Avenue  
                    Arlington, MA 02476

PROPOSER

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PROJECT:         Consultant Services for an Economic Analysis of Industrial Zoning Districts

Proposed Price (in words): \_\_\_\_\_

Proposed Price (in numbers): \$ \_\_\_\_\_

Please attach estimated budget and breakdown by planning element of professional service fees, assigned project staff and hourly billing rates of staff.

\_\_\_\_\_ Title

\_\_\_\_\_ Date Signed