

**REQUEST FOR QUALIFICATIONS (RFQ)**  
Residential Design Guidelines  
RFQ # 19-52

The Department of Planning and Community Development (DPCD) acting through the Town Manager is requesting quotes from qualified individuals and firms for Consulting Services related to developing residential design guidelines for the Town of Arlington.

The RFQ may be viewed and downloaded from 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 must be received by the Purchasing Officer, Town of Arlington, Massachusetts on or before 2:00 p.m., November 5, 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 RFQ and the scope of work is scheduled for Thursday October 24, 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 RFQ may be submitted by 4:00 p.m. Friday October 25, 2019. Responses to questions, including those raised at the briefing session, will be sent to those requesting the RFQ and posted online as addenda to the RFQ.

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 "RFQ #19-52 Residential Design Guidelines - Technical Proposal" and one (1) copy of the price proposal in a sealed envelope marked "RFQ #19 -52- Residential Design Guidelines - 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

October 16, 2019

**REQUEST FOR QUOTES  
RESIDENTIAL DESIGN GUIDELINES  
OCTOBER 16, 2019**

**Responses Due:** November 5, 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)

RFQ No. 19 –52

**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 create residential design guidelines and recommend a design review process. Specifically, DPCD seeks the professional services from experienced planning, urban design, or architecture firms qualified to prepare design guidelines for new or significantly renovated residential development within the Town's low density zoning districts (R0, R1, and R2). The final deliverable should include a mix of text, photographs, and illustrative drawings, including 3-D perspective drawings to clearly convey the intent of the guidelines. It is expected that the consultant will work with DPCD and a Design Review Working Group.

This effort is funded through an appropriation from Town Meeting for Fiscal Year 2020 for a total of \$50,000.

**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 town. Approximately 85% of the land area in Arlington is zoned residential and the remaining 15% of land is zoned open space, commercial, and industrial. The low density residential districts (R0, R1, and R2) are approximately 73% of the land area. The business and industrial districts are generally along Massachusetts Avenue and Broadway. Arlington has 33+ acres of protected open space.

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 Law, the Arlington Town Manager Act, the Town Bylaws, and the Arlington Zoning Bylaw. The Arlington Redevelopment Board (ARB) serves as both 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 Subsequent Implementation**

In May 2015, the Arlington Town Meeting voted to endorse the Arlington Master Plan, "Your Town Your Future" with approximately 75% of Town Meeting Members voting in favor of the plan. The Master Plan sets forth policy goals and strategies for the community. Specific to the town's residential neighborhoods, the Master Plan discusses how increases in local residential real estate values have led to the demolition of smaller scale houses and their replacement by large houses that are out of scale with the character of existing neighborhoods. The Master Plan suggests that changes to setback requirements and floor area ratios as well as other techniques might be considered to control the size and scale of the new housing in the low density residential zoning districts (R0, R1, and R2).

The Master Plan also recommended creating commercial and industrial district design guidelines, and in 2015, the ARB adopted "The Design Standards for the Town of Arlington."<sup>2</sup> These design standards focus on Arlington's primary commercial and transportation corridors: Massachusetts Avenue and Broadway, the Mill Brook and the Minuteman Bikeway. The intention of the standards is to address building siting and orientation, height and setbacks, parking strategies, and signage, which helps the town regulate built form and clarifies expectations for both developers and the public at large. The ARB incorporates these design standards in their review of projects that trigger Environmental Design Review (Section 3.4 of the Zoning Bylaw).

Most recently, following a year-long research project into the reviewing the effect of replacement housing on the community, DPCD determined that advancing residential design guidelines is the most appropriate method for identifying specific design typologies that fit with a range of neighborhood design contexts with the goal of creating a harmonious relationship between existing housing stock and new housing stock. In developing residential design guidelines, the community can identify topic areas that reflect their design preferences, such as mass and building design, site planning, landscape, open space, and circulation, and set forth accepted standards that would address these topic areas in new construction. At this time, DPCD is advancing design guidelines as the annual number of residential tear downs is limited. DPCD has not yet considered how residential design review would fit into the overall organizational structure and permitting process in Arlington.

## **III. SCOPE OF SERVICES**

### **A. Background Review**

The following tasks are included in the background review:

1. Kick-off Meeting: The consultant will meet with DPCD staff to discuss the Scope of Work and to assess the related available documents. The kick-off meeting will also include a tour through Arlington's representative neighborhoods.
2. Document Review: The consultant will review relevant materials, including plans and photographs, and assess design guidelines and manuals from other communities that may be applicable to the

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

<sup>2</sup> <https://www.arlingtonma.gov/home/showdocument?id=45347>

Town of Arlington. The consultant will also work with DPCD to review the organization structure and existing permitting process.

## **B. Existing Conditions and Analysis**

The following tasks are included in the existing conditions and analysis:

1. Document Existing Conditions: The consultant will inventory the R0, R1, and R2 zoning districts, both existing structures and recently built structures, to understand the context and defining elements.
2. Prepare Inventory and Recommendation Memorandum: The consultant will prepare a memorandum that summarizes the character, development patterns, historic resources, and existing conditions of the R0, R1, and R2 zoning districts. The memorandum should focus on the design compatibility of recently built structures in relation to the surrounding context. The memorandum should include recommendations on how to apply design guidelines to the existing organizational structure of the town and its permitting processes, or identify if a new process should be established.
3. Neighborhood Workshops: Working with DPCD and the Design Review Working Group, the consultant will assist in holding two neighborhood workshops that will further explore the character and conditions of the R0, R1, and R2 zoning districts. The consultant should feel free to propose methods and formats for these workshops.

## **C. Preparation of Draft Design Guidelines and Process**

The following tasks are included in the preparation of draft design guidelines and process:

1. Draft Design Guidelines: The consultant will prepare draft illustrated design guidelines for review by DPCD staff. The draft should be user-friendly and provide a balanced mixture of text and graphics to provide residents, architects, developers, and other decision makers with clear guidance on quality design for new residential development.
2. Draft Process: The consultant will also prepare the draft process for review by DPCD staff. The draft process should identify how residential design review is proposed to be incorporated into the organization.

## **D. Preparation of Public Review Design Guidelines and Process**

The following tasks are included in the preparation of public review design guidelines and process:

1. Public Review Design Guidelines and Process: Following review of the draft design guidelines and process, the consultant will prepare design guidelines and process for public review.
2. Community Meeting: Working with DPCD and the Design Review Working Group, a community meeting will be held to present the public review design guidelines and process. The consultant should feel free to propose a method and format for this community meeting.

## **E. Preparation of Final Design Guidelines and Process**

The following tasks are included in the preparation of final design guidelines:

1. Final Design Guidelines and Process: The consultant will prepare final design guidelines and process. The final design guidelines and process should incorporate feedback from the community meeting, the Design Review Working Group, and DPCD.

## **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 meetings with staff and the Design Review Working Group as needed. The staff will present information prepared by the Consultant at 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 September 2019. The goal is to present the product at a Town Meeting. 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.

#### **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 urban design, neighborhood design guidelines and implementation, and community engagement with projects of similar size and scope.
2. 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.
3. 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.
4. The firm/team must have proven experience in the public sector and in working with federal, state and municipal agencies, and neighborhood/business organizations.
5. The volume of the 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 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.

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

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 urban design, neighborhood design guidelines and implementation, 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 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 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 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 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 RFQ.

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

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

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 RFQ. 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 #19-52 - Residential Design Guidelines - Technical Proposal".
  1. Cover letter, including a profile introducing the firm, as well as the name, telephone number, and email address of the primary contact for the project.
  2. General description of the firm/team's experience.
  3. Description, with examples, of the firm/team's experience in working with municipalities to successfully implement design guidelines and a design review process.
  4. A detailed work plan based on the 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 RFQ.
  5. An outline of the schedule for completion of tasks (timeline) as presented in the firm/team's approach to the scope of services.
  6. 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.
  7. 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).
  8. Other pertinent information about the firm(s) that would aid the Town in making a selection.
  9. Completed Required Forms.
  10. Evidence of insurance coverage, including general and professional liability and Workers' Compensation insurance.
- Sealed Submission, one (1) copy, clearly marked "RFQ #19-52- Residential Design Guidelines - 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, Design Review Working Group 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 RFQ, 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 October 24, 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. Friday October 25, 2019 .

Responses to the RFQ are due by **2 PM on Tuesday November 5, 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

If it is determined to be necessary, any interviews with prospective consultants will be scheduled in November 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 RFQ. 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  
RESIDENTIAL DESIGN GUIDELINES**

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**  
**RESIDENTIAL DESIGN GUIDELINES**

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.

