

REQUEST FOR QUALIFICATIONS (RFQ)

**Planning Consultant Services:
Comprehensive Zoning Update Including Section (3A) Zoning Compliance**
[Subject to Additional Appropriations]

Town of Middleton, Massachusetts
May 11, 2023

The Town of Middleton seeks a Planning Consultant to lead the town to perform a comprehensive zoning update and achieve compliance with the MBTA Communities As-Of-Right Multi-Family Zoning District requirements. This Request for Qualifications (RFQ) has been prepared and issued by the Town as a process to select the best consultant for this task.

Middleton is identified as an MBTA “Adjacent Community” as there are no MBTA stations in Town or within ½ mile of its border. It is therefore necessary that the Town undertake a study examining the feasibility of creating a zoning district or districts that allows a minimum of 750 multi-family units as of right. In order to successfully sponsor a zoning amendment for Town Meeting approval, it will be necessary to undertake an iterative public process that involves all town residents and stakeholders.

The Town has appropriated local funds and plans to apply to the Community One-Stop Grant Program for Community Compact Funds that, if awarded, will be available in July 2023. The town will be selecting a consultant from the State’s PRF76 Approved Consultants List through this targeted solicitation for qualifications. The Town will select the Consultant that in the Town’s opinion outlines a clear and comprehensive approach to a public engagement process that helps build consensus, engages voices that are typically not represented, and illustrates a strong understanding of the State’s technical assessment tools developed for this initiative. The public engagement process should contain both in person and remote access possibilities. Selection details can be found down below. The Town is interested in a consultant team with strong communication and presentation skills and an ability to translate technical information into easily understood maps and graphics for various engagement opportunities. The Town would also prefer to have any proposed Section 3A zoning submitted to the state for a [“pre-adoption review.”](#)

Town Planner Katrina O’Leary will work directly with the Consultant as Project Manager and will be the primary point of contact for the Project.

Town Staff will be involved with reviewing potential multi-family zoning districts and offering feedback on provision of services and environmental constraints.

In addition to Town staff roles, regular updates regarding this initiative will be provided at meetings of the Planning Board. All meetings will be posted publicly, and all Planning Board meetings are televised on local cable and available for viewing on the Town’s website.

The Town anticipates engaging the Planning Consultant in July 2023. The Consultant would then undertake the following tasks within the general timeline indicated. Timeline includes a goal of any

zoning amendments being placed on the May 2024 Town Meeting Warrant; however, if the process requires more time, the process could be extended to a special Town Meeting. The deadline for Section 3A compliance is December 31, 2024.

Schedule and Tasks

Task 1 Project Kickoff July-August 2023

- a. Facilitate kick-off meeting with the Planning Board (Public Meeting #1) to:
 - review the project scope
 - explain the requirements under MGL c. 40A, Section 3A
 - describe the planned public engagement strategy
- b. Conduct a day time training for staff about requirements of the law and outline the scope of the initiative.
- c. Prepare information suitable for the general public for the Town’s website.
- d. Set up a newsletter template and listserv where people will be able to opt into email blasts to get project information and news. Approximately five digital newsletters will be sent during this effort.
- e. Send newsletter #1.

Task 2 Gather and Analyze Information August-October 2023

- a. Determine Town’s recent goals and strategies through focused staff and board member interviews and by reviewing existing 2018 Master Plan, 2019 Housing Production Plan, 2022 Zoning Audit, maps, infrastructure/capital improvement plans, etc.
- b. Analyze current Zoning Bylaw and identify barriers to achieving compliance with the Multi-Family Zoning requirements.
- c. Review existing conditions, and create a map or maps to illustrate land use and transportation patterns, “Developable Land” of a scale as defined in the MBTA Communities Guidelines, existing infrastructure in Town, and areas meeting the State’s Smart Growth Principles to the greatest extent practicable.
- d. Facilitate Public Meeting #2 before the Planning Board to review information and receive feedback (a-c above). Produce materials as necessary including outreach materials, and meeting summaries, newsletter information, and for populating the website.
- e. Send newsletter #2.

Task 3 Preliminary Draft of Proposed Zoning Bylaw Changes October -December 2023

- a. Identify up to three potential Section 3A compliant districts or district combinations.
- b. Outline potential regulatory changes required for compliance (height, parking requirements, use restrictions).
- c. Create maps of potential zoning district(s) or district combinations.

- d. Present Density Visualizations, Visual Preference Surveys, or similar strategies to gauge community choices.
- e. Identify options for regulatory approaches.
- f. Utilize the MBTA Communities Compliance Model to evaluate identified District(s) for compliance with density, size, and minimum unit capacity.
 - Export parcel data and import data into the compliance model.
 - Review existing zoning and assist with completion of the model checklist.
 - Review proposed zoning and assist with completion of the model checklist.
 - Determine parcel overrides in the model if changes to constrained land are required.
 - Run the model to test for compliance with district size, unit capacity, density metrics, etc.
 - Test potential modifications and amendments to district boundaries and/or intensity requirements.
- g. Generate Findings Report with Recommendations for Zoning Amendment(s).
- h. Facilitate a Public Community Meeting #3 to review materials and receive feedback (a-e above). Produce materials as necessary for the Public Meetings including outreach materials, and meeting summaries, newsletter information, and for populating the website.
- i. Send newsletter #3.

Task 4 Draft Zoning Bylaw Amendments January-February 2024

- a. Provide Draft Zoning Bylaw Amendments that focus on addressing findings and recommendations from the 2022 Zoning Audit, the Master Plan, and Housing Production Plan as well as compliancy with the Section 3A requirements.
- b. Review existing zoning and other applicable state and local regulations for ALL potential conflicts (limitations, restrictions, defined terms).
- c. Develop all necessary amendments to existing Bylaw in a form customary to municipality. Propose grouping zoning amendments (if necessary) into the most advantageous groupings in terms of the type of vote necessary to adopt (2/3 majority vs. regular majority vote).
- d. Facilitate Public Community Meeting #4 to review materials and receive feedback (a-c above). Produce materials as necessary for Public Meeting including outreach materials, easy-to understand explanatory material (graphic and narrative), newsletter updates, and meeting summaries. Send newsletter #4 – include dates of Planning Board Public Hearing and Town Meeting.

Task 5 Pursue Zoning Bylaw Amendment per G.L. Ch 40A, S. 5. March – May 2024

- a. Incorporate feedback into revised Draft Zoning Bylaw Amendments.
- b. Send newsletter #5 two weeks before Town Meeting.
- c. Produce materials as necessary for the required Planning Board Hearing (Public Meeting #5); including outreach materials, easy-to understand explanatory material (graphic and narrative), and newsletter updates. Support the Town Planner and Planning Board in preparing for and presenting at the required MGL c.40A Public Hearing and the Town Meeting.

Selection Process

If you are interested in providing consulting services to the Town for this initiative, please submit your proposal for Town review with the following:

- Brief (no more than three pages) description of your approach to this project, including any recommended changes to the above tasks, along with a recommended budget and schedule by task.
- Sample of outreach/presentation materials for a similar project.
- Team member qualifications and experience on similar projects.

Send your response via email to Katrina.oleary@middletonma.gov. Submissions shall be received no later than 12:00 noon on Wednesday, June 21, 2023. Any questions or inquiries regarding this RFQ should be sent to the same e-mail address no later than 12:00 noon on Wednesday, June 2, 2023. Please note that Katrina O'Leary will be on vacation the week of June 12-16.

The Town's Consultant Review Team will include the Planning Board Chairperson, the Town Planner, and the Interim Town Administrator. Upon review of submission qualifications, the Town anticipates recommending two or more firms for interview, said interviews to be conducted by the Planning Board. The successful Consultant will be selected based on the following criteria:

- 1) Demonstrated successful completion of projects of comparable scope.
- 2) Established competence and experience of proposed project team members.
 - a. Project approach
 - b. Effective public engagement
 - c. Technical expertise
 - d. Graphic excellence.
- 3) Proposed schedule and budget. The Team will recommend two or more Consultants (if possible) for an interview by the Planning Board. The Planning Board will make a recommendation for contract award to the Chief Procurement Officer, who will prepare a standard town contract. The anticipated date of contract award is early July 2023. Any contract is subject to receipt of grant funding.

The Town of Middleton reserves the right to reject any proposal, in whole or in part, and to negotiate the terms and conditions with any proposer and to accept any proposal, in whole or in part, which the Town deems, in its sole opinion, to be in the best interest of the Town of Middleton.