

REQUEST FOR PROPOSALS

TOWN OF SHREWSBURY
STRATEGIC PLAN PROJECT

**REQUEST FOR
PROPOSALS DUE:
1:00 PM ON MONDAY,
SEPTEMBER 20, 2021**

Addressed to the attention of
Kevin Mizikar, Town Manager
100 Maple Avenue,
Shrewsbury, MA 01545.
Electronic submissions to
KMizikar@ShrewsburyMA.gov





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1. PROJECT OVERVIEW

1.1. PURPOSE

The purpose of this Request for Proposals (RFP) is to solicit competitive, sealed proposals for the development of a community-based vision and strategic plan for the Town of Shrewsbury, Massachusetts (“Town”).

1.2. OBJECTIVES

The Town intends to create its first Strategic Plan to chart the future of the town through 2030. The key objective of this RFP is to identify the right partner for the Town who is capable of successfully facilitating a visioning process with community input and translating the community’s shared vision into a planning document with goals and tasks that will help shape decisions related to program development and budget expenditures for the next three to five years..

The Town anticipates the planning process will take up to 12 months to provide adequate time to establish an outreach approach, research, robust citizen engagement and input, analysis, strategies and opportunities, along with the implementation plan that will guide the Town for the defined time frame.

The 2030 strategic plan will guide policy development, prioritize demands and opportunities, and generate an implementation plan to realize defined vision. This important tool is developed through the lens of community visionaries with specific goals, targets, measures, milestones, and strategies.

Specifically, this visioning process with the Town’s citizenry should:

1. build a stronger relationship between the community and local government by developing a shared set of priorities; and
2. help us identify options, consider opportunities and determine any trade-offs that may be necessary to reach our goals.

The Town is aware that there are a variety of perspectives, models, and approaches available to develop a strategic planning document; therefore, the successful firm should be able to discern which model or model(s) will best enable the Town to complete its organizational and programmatic goals listed in the Scope of Work.

1.3. SCOPE OF WORK

As envisioned, the scope of work for this proposal will primarily consist of, but not necessarily be limited to the following tasks:

- Get to know Town Operations and Information:
 - High-level review of existing planning documents, Town of Shrewsbury organizational information, budget information, Town bylaws, and other related documents available on the Town’s website (www.shrewsburyma.gov) to understand current strategies and assess how or if they should be included in the 2030 Strategic Plan. Such information may include its finances, infrastructure, staff, demographics, socioeconomics, education, business development, housing, arts, culture, history, recreation, natural features, geography, entertainment and technology.
 - Meet with Town leaders and stakeholders to gain a working knowledge of the history, vision and values of the community.
 - Understand existing programs and partnerships to serve as a baseline to identify service gaps and opportunities for delivery options, partnerships and collaborations.

- Facilitate a community visioning process.
 - This process may consist of public meetings, stakeholder group sessions, outreach forums, online survey(s), social media, information booths at local events, discussions with Town staff, innovative approaches and other appropriate outreach deemed necessary to achieve robust input from this diverse community. These sessions should include a public education component and be considered an important component of community building and civic engagement beyond just the scope of developing a plan.
 - Coordinate a community visioning process with the Town’s project team to develop a work plan of activities and communications. The work plan shall include an online presence for this project to promote public involvement that is critical to the success of the process, and similar materials suitable for public distribution and outreach. The project team, assigned by the Town Manager, will guide project direction and oversee planning activities.
 - Facilitate the creation of the vision statement for the Town of Shrewsbury for 2030 based on the analysis of the community visioning process.

- Develop a clear set of goals, action steps and policy statements that define the priorities and vision articulated by citizens and clarify how these goals will be achieved.

- Recommend ways in which the Town can be structured to best fulfill the goals and action steps in order to effectively and efficiently operate to maximize citizen services and sustain these services at a high level.

- Draft a final plan document for review and presentation of the plan to the broader community. Participate in the review and refinement of this document.

- Facilitate the development of performance metrics – key indicators and outcomes that can serve as a basis for performance measure for the organization.
- Produce a workable planning document that has broad citizen support, clearly outlines the community vision and identifies clear policies, goals and action steps necessary to achieve the community’s vision.
- Facilitate the development of a process to keep the Board of Selectmen involved and engaged in identifying potential strategic initiatives that support goals and tasks, including use of Board of Selectmen meetings to handle strategic discussions, feedback loops, newsletters, and regularly scheduled reviews and reports.
- Facilitate the development of a process that keeps Town employees involved and engaged in implementing strategic initiatives that support goals and tasks, including focus groups, departmental plans, annual work plans, feedback loops, newsletters, regularly scheduled reviews and reports.

The selected Consultant shall provide regular progress reporting and will closely coordinate its planning services schedule with the Town and its designated project management personnel. The Consultant shall be required to provide a primary point of contact to the Town for the duration of the project and shall be expected to attend regular project status and management meetings. The Consultant shall provide monthly progress reporting and forecasting of future phases of the project.

1.4. BACKGROUND

The Town of Shrewsbury is located in central Massachusetts in Worcester County, approximately 40 miles from Boston. It is bordered on the west by the City of Worcester. Shrewsbury was incorporated as a Town in 1727. The Town has a population of 37,387 (2017) and occupies approximately 22 square miles of land areas. Shrewsbury is governed by a Selectmen/Manager form of government with a Representative Town Meeting.

Shrewsbury is a proud New England town focused on sustainable self-sufficient operations. Our mission dedicates us to foster a vibrant, economically competitive and safe community for all to thrive. In doing so the Town offers a full range of traditional municipal services including public safety, human services, community development, education all of which are underpinned with excellent financial and administration support. Our financial management has led to a AAA Bond Rating by S&P Rating Services. The Town manages an annual budget of \$137,881,286.

Shrewsbury has a highly educated and diverse population that are engaged in their community. For residents aged 25 and over, 95% have at least a high school education, 58.4% have a bachelor’s degree and 28.1% have a graduate degree or higher. Shrewsbury residents are 72.5% White, 18.5% Asian, 5.4% are Hispanic or Latino, 4.1% are of two or more races and 3.4% are Black or African American. 23.2% of the population is foreign born.

The Town services Shrewsbury’s utility needs internally including water, stormwater management, solid waste, and wastewater. Additionally, the Town provides world class electric

and telecommunications services directly to residents through Shrewsbury Electric and Cable Operations (SELCO). Our sustainable self-sufficiency is well rooted. Water and electric services have been provided by the Town to its residents and customers since 1905 and 1908 respectively. However, our focus on sustainability also leads to partnerships with surrounding towns for many non-utility services and also for the treatment of our wastewater.

The approach provides the Town with a competitive advantage by providing extremely high value to our residents and businesses that operate within town. Shrewsbury offers a single tax rate of \$13.19 per \$1,000 of assessed value, which ranks it in the top 25% for having the lowest residential rate and top 15% for having the lowest commercial and industrial rate in the Commonwealth. This has provided consistent growth in our residential sector, and continued manageable growth in our business and commercial sectors. In the last three years the Town has supported and facilitated over \$120,818,900 in new commercial and industrial development.

The Town's water, sewer and stormwater rates trend in the top half of the rates in central Massachusetts but are much more competitive when you consider they fully account for the breadth of reinvestment they enable which further increase the quality of services provided. These utilities are fully self-sufficient and enable a cycle of capital improvements and critical infrastructure replacement that ensures the systems long term sustainability.

Shrewsbury residents and businesses also reap the benefits of having a municipally owned public power utility serving the community. Shrewsbury Electric and Cable Operations (SELCO) has been providing reliable, affordable electricity to the Shrewsbury community for more than a century, since 1908. Shrewsbury's cable operation was established in 1983 and has evolved to offer "triple play" services including internet, telephone, and video. SELCO currently features cutting edge broadband infrastructure that provides direct fiber connections to homes and businesses.

2. PROCUREMENT PROCESS

2.1. Request for Proposals

The Town of Shrewsbury will receive sealed proposals for the Strategic Planning Services until **1:00 PM on Monday, September 20, 2021**, addressed to the attention of Kevin Mizikar, Town Manager 100 Maple Avenue, Shrewsbury, MA 01545. Electronic submissions to KMizikar@ShrewsburyMA.gov. Proposals shall be submitted in the form and manner defined by this document and shall be mailed or delivered to reach the designated office on or before the above stipulated date and time.

Electronic Submissions will be determined to be received by the time and date assigned by the Town of Shrewsbury's email system. If multiple emails are required all emails must be received prior to the deadline.

Late submissions will not be accepted.

2.1.1. EXAMINATION OF CONTRACT DOCUMENTS

- Consultants shall inform themselves of all conditions under which the work is to be performed, and all other relevant matters concerning the work to be performed. The successful Consultant must employ, as far as possible, such methods and means in the carrying out of this work as will not cause interruption or interference with any other Consultants presently conducting services to the Town.
- Consultants must satisfy themselves by personal examination of the proposed work and by such other means as they may prefer as to the correctness of any services listed in their proposal, and shall not, after submission of their proposal, dispute or complain of such estimate nor assert that there was any misunderstanding in regard to the nature or amount of work to be done.
- Before submitting a proposal, each Consultant shall examine carefully the Sample Agreement Documents comprised in this RFP, and all Appendices and Addenda thereto, all of which contain provisions applicable not only to the successful Consultant but also to any subconsultants.

2.1.2. SIGNING OF PROPOSALS

If the Consultant is a corporation, the legal name of the corporation shall be set forth together with the signature of the officer or officers authorized to sign Agreements on behalf of the corporation; if Consultant is a co-partnership, the true name of the firm shall be set forth together with the signatures of all the partners; and if Consultant is an individual, his/her signature shall be inscribed. If signature is by agent, other than an officer of a corporation or a member of a partnership, a power of attorney must be on file with the Town prior to opening proposals or submitting proposals; otherwise, the proposal may be disregarded as irregular and unauthorized.

2.2. SCHEDULE OF EVENTS

The procurement schedule of events for Strategic Planning Services is highlighted in the timeline shown below.

RFP		
Advertisement	Wed	08/25/21
Pre-Proposal Conference (10:00 AM ET)	Wed	09/01/21
Question and Answer Period Start	Wed	09/01/21
Q&A Process Ends (12:00 PM ET)	Mon	09/10/21
Proposals Due (1:00 PM ET)	Mon	09/20/21
Admin/Compliance Review	Fri	09/21/21
Evaluation Begins	Mon	09/21/21
Presentations by Selected Firms	Thu	09/30/21
Award Selection	Mon	10/04/21
Contract Discussions Begin	Tue	10/04/21
Award Announcement	Tue	10/12/21

2.3. QUESTIONS & ANSWERS

Specific questions concerning the RFP shall be submitted via email to Taylor Galusha tgalusha@shrewsburyma.gov during the period from September 1, 2021 through Noon Eastern Time on September 10, 2021. Questions will also be entertained during the pre-proposal conference (see below), however, responses to those questions may be deferred and answered at a later date, but no later than September 10, 2021. Oral responses are to be considered tentative. Written (email) copies of all questions and official responses will be supplied to all Consultants who attend the pre-proposal conference.

2.4. PRE-PROPOSAL CONFERENCE

A mandatory pre-proposal conference is scheduled at **10:00 AM Eastern Time on Wednesday, September 1, 2021** at the Selectmen's Meeting Room, Shrewsbury Town Hall, 100 Maple Avenue Shrewsbury, Massachusetts 01518. While in person attendance is preferred at the time of publication firms may also participate via Google Meet: meet.google.com/dui-bmum-kcz Any individual, firm or partnership interested in submitting a proposal shall attend and should be represented by a project manager or a member of the planning services project team of said firm or partnership. Attendance will be verified via sign-in sheet and introductions by those on participating remotely.

2.5. RESPONSE SUBMISSION

Respondents to this RFP shall submit responses to be delivered as defined above in Section 2.1 no later than **1:00 PM on Monday, September 20, 2021**. Section 3 of this RFP provides proposal response requirements. Responses must be delivered by the due date and time.

2.6. PROPOSAL EVALUATION AND AWARD

2.6.1. CONSULTANT QUALIFICATIONS

The successful firm or team (individually and collectively the “Consultant”) will satisfy the following qualifications and the proposal must address specifically each of the following criteria:

- A. At a minimum, the Consultant must have at least five (5) years of experience in strategic planning, comprehensive plan development, public policy, or management consulting;
- B. 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;
- C. The Consultant must have previous experience in the management of public information processes and developing municipal strategic plans. Completion of two (2) such projects in similar municipalities within the last five (5) years is preferred, and completion of five (5) overall such projects are desired (Provide information and/or website links to projects); and
- D. The volume of the Consultant’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 Consultant and all team members must be capable of devoting a significant amount of time (See Projected Schedule p. 12) to this project in order to complete the work within the schedule outlined in this RFP. The proposal must include a description of the Consultant firm(s) and bios for all members of the Consultant team, including the following information:
 - 1. Name, address, email and telephone number of the proposing Consultant, the name of the contact to which all correspondence should be addressed, and the names and primary responsibilities of each individual on the Consultant team, including estimated percent of time attributable to the project;
 - 2. Background information, including firm resumes and resumes for all principals and employees expected to be assigned to the project;
 - 3. Description of the Consultants, including all participating firms, experience, collectively and individually, and with similar projects. Particular attention should be given to demonstrate experience with projects of a similar scale and complexity;
 - 4. Description of the organizational structure of the Consultant team and a plan for the maintenance of effective communications between the Town and the Consultant team during all phases of the project; and
 - 5. References: the names, addresses, telephone and fax numbers and email addresses of at least three business references who may be contacted

regarding the Consultant's business experience, including the experience of all participating firms.

The Town reserves the sole right to determine whether an equivalent combination of experience and projects meets the criteria stated above.

All proposals will be reviewed under the Comparative Evaluation Criteria listed below. Each criterion will be assigned a rating of Highly Advantageous, Advantageous, Non-Advantageous or Unacceptable.

The Town reserves the exclusive right to reject any and all proposals or to cancel the RFP as is determined to be in the best interests of the Town. It is anticipated that all respondents will be notified of the results of the selection process in writing within sixty (60) days of the submission deadline.

2.6.2. COMPARATIVE EVALUATION CRITERIA

- A. Staffing Plan, including the professional qualifications of all project personnel with particular attention to training, educational background, and professional experience. Demonstrated expertise and experience of the Principal-in-Charge, Project Manager, and any other key personnel and any Consultants to be assigned to the Project.

Highly Advantageous: The proposed staffing plan provides ample human resources to fully execute all aspects of the project with a qualified and experienced team and meets all the minimum applicant qualifications detailed in Section 9, "Consultant Qualifications," as well as a strong and realistic assignment of staff to achieve project goals within the specified time frame and cost limitations.

Advantageous: The proposed staffing plan provides sufficient resources to execute all aspects of the project with a qualified team that meets all the minimum applicant qualifications detailed in Section 9, "Consultant Qualifications" and a detailed assignment of staff to achieve project goals within the specified time frame and cost limitations.

Not Advantageous: The proposed staffing plan does not provide sufficient detail to evaluate the sufficiency of staffing to execute all aspects of the project or does not meet all the minimum applicant qualifications detailed in Section 9, "Consultant Qualifications".

Unacceptable: The proposed staffing plan does not meet all the minimum applicant qualifications detailed in Section 9, "Consultant Qualifications".

- B. Methodology, including a reasonable, realistic plan to complete all aspects of the project which addresses all of the required elements of the strategic plan.

Highly Advantageous: The plan of services proposes a detailed, logical, creative, and highly efficient scheme for producing a complete project that addresses all of the required issues detailed in Section 4, "Conceptual Overview & Required Elements"

Advantageous: The plan of services proposes a credible scheme for producing a complete project that addresses all of the required issues detailed in Section 4, “Conceptual Overview & Required Elements”.

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 detailed in Section 4, “Conceptual Overview & Required Elements”.

Unacceptable: The plan of services neither fully addresses nor contains all of the components detailed in Section 4, “Conceptual Overview & Required Elements”.

- C. Depth of experience with similar projects, and prior experience with public contracts and relevant codes, laws, and regulations. (Please provide web links to similar projects)

Highly Advantageous: The Consultant has at least five (5) years of experience consulting with municipalities on projects of similar size and scope to this project.

Advantageous: The Consultant has at least three (3) years of experience consulting with municipalities on projects of similar size and scope to this project.

Not Advantageous: The Consultant has less than three (3) years of experience but more than one (1) year consulting with municipalities on projects of similar size and scope to this project.

Unacceptable: The Consultant has less than one (1) year of experience consulting with municipalities on projects of similar size and scope to this project.

- D. Ability and knowledge to serve as a resource to the Town as evidenced by direct involvement in (1) the development of strategic plans and processes; (2) projects developing core community values, mission statement and vision statement; (3) projects involved in developing a mission statement and vision statement; (4) projects translating conceptual goals of the visioning process into realistic, achievable targets; and (5) projects charting an effective, realistic and innovative course of action for the Town’s future.

Highly Advantageous: Substantial involvement, i.e. lead consultant, in each of the five (5) types of projects specified.

Advantageous: Involvement in each of the five (5) types of projects specified.

Not Advantageous: Involvement in at least three (3) of the five (5) types of projects specified.

Unacceptable: Involvement in no more than one (1) of the five (5) types of projects specified.

- E. Strength and credibility of Client references; prior client satisfaction with working relationship, project management capabilities, and technical expertise in developing similar projects.

Highly Advantageous: More than three (3) clients who consider the Consultant's services satisfactory or better.

Advantageous: Three (3) clients who consider the Consultant's services satisfactory or better.

Not Advantageous Three (3) or more clients not all of whom consider the Consultant's services satisfactory or better.

Unacceptable: Fewer than three (3) clients who consider the Consultant's services satisfactory or better, or three (3) or more clients who consider the Consultant's services unsatisfactory.

- F. 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 of the project objectives stated in the RFP.

Advantageous: The response contains a clear plan that addresses most of the project objectives stated in the RFP.

Not Advantageous: The response does not contain a clear plan that addresses most of the project objectives stated in the RFP.

Unacceptable: The response does not contain a plan to address the project objectives stated in the RFP or the proposed plan does not adequately address the project objectives.

- G. A background and track record in promoting and sustaining a high degree of participation by Town residents and all other stakeholders, which must include experience in conducting public forums or similar large-scale "brainstorming" sessions, workshops, focus groups and other smaller-scale methods;

Highly Advantageous: All of the Consultant's references indicate the project had a high degree of participation of all constituencies with large attendance and participation at public meetings,

Advantageous: Most of the Consultant's references indicate the project had a high degree of participation of all constituencies with good attendance and participation at public meetings.

Not Advantageous: One of the Consultant's references indicated the project had a high degree of participation of many constituents with fair attendance and participation at public meetings.

Unacceptable: The Consultant's references do not indicate the participation rates of public meetings.

H. Demonstrated ability to meet project budget and project timetable.

Highly Advantageous: All of the Consultant's references indicate that the projects were completed within or below budget and on schedule.

Advantageous: One of the Consultant's references indicates that the project was not completed within budget with reasons attributable to the Consultant or with substantial delays attributable to the Consultant, and no current project or project completed in the last three (3) 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 with reasons 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 (2) of the Consultant's references indicate that the project was not completed within budget with reasons attributable to the Consultant or was completed with substantial delays attributable to the Consultant.

2.6.3. ADMINISTRATIVE/PRELIMINARY REVIEW

First, the proposals will be reviewed to determine the proposal's compliance with the following requirements:

- Proposal was received by deadline, and
- Proposal is complete and contains all required documents, and
- The Consultant attended the pre-proposal conference

If the Consultant's proposal passes the Administrative/Preliminary Review, the Consultant's response will continue through the evaluation process.

2.6.4. ORAL PRESENTATIONS/DEMONSTRATIONS

After initial review of RFP Technical Proposal responses, finalists may be invited to present oral presentations for the purpose of introducing key members of the project team, and allowing the Town to fully understand the Consultant's ability to meet the technical requirements criteria. The scheduled dates for any such presentations, specific details, and instructions will be provided as required, though presentations are tentatively scheduled for **Thursday, September 30, 2021**.

2.6.5. RULE FOR AWARD

The Town will award one contract to the most advantageous proposal from a responsible and responsive proposer taking into consideration price and non-price proposals.

3. RESPONSE REQUIREMENTS

3.1. PREPARING A RESPONSE

When preparing a response, the Consultant may utilize any format that clearly communicates their proposed approach for satisfying the scope of work and which demonstrates their qualifications to the Town.

Each Consultant submitting proposals shall provide and pay for all materials, labor, transportation, charges, taxes, fees or expenses incurred, including all costs to prepare a response to the RFP, travel and presentation costs, and all other services and facilities necessary for the preparation of the RFP.

3.2. PACKAGING THE RESPONSE

The Consultant's Technical Proposal and Price Proposal in response to this RFP must be appropriately labeled and in a sealed package. The package must be labeled as follows:

Hard Copy:

Town of Shrewsbury
Strategic Plan Project
Kevin J. Mizikar, Town Manager
100 Maple Avenue
Shrewsbury, MA 01545

Electronic:

Subject Line of Email: Strategic Plan Project Submission_[NAME OF CONSULTANT]_[Email x of x]

The contents shall include the following:

3.2.1. Technical Proposal

- Cover Letter with Authorization Signature
- Executive Summary
- Technical Proposal
- Statement of Tax Compliance Form - MGL Ch. 62C, Sec. 49A
- Certificate of Non-Collusion Form
- If submitting electronically the Technical Proposal and Price Proposal shall be separate files

3.2.2. Price Proposal

- The Consultant shall submit an estimated cost summary with a not to exceed amount in a separate envelope and electronic file/document marked "Price Proposal" to provide all of the services required to fully complete the services defined in this document.
- If submitting electronically the Technical Proposal and Price Proposal shall be separate files

3.3. COPIES REQUIRED/FORM OF ELECTRONIC SUBMISSION

Consultant must provide the following number of copies for EACH the Technical Proposal and the Cost Proposal:

- Five (5) hard copies, with one (1) marked “Original” with original signatures; OR
- One (1) electronic submission with document in .PDF format.
 - Documents must be attached to the email
 - A link to a cloud based document or folder will not be accepted

3.4. TECHNICAL PROPOSAL REQUIREMENTS

The Consultant's proposal shall be designed so as to ensure that all defined technical requirements are met. Failure to adequately meet requirements may be cause for the proposal to be rejected. This RFP requires the return of sufficient narrative in response to the technical requirements of this document, including any exceptions the Consultant may take. Failure to return required documents may be cause for rejection of proposal.

3.4.1. Mandatory Technical Requirements

Submissions shall include agreement by the Consultant to meet the mandatory technical requirements of this document. A complete list of the Mandatory Requirements is contained in the categories are as follows:

- **Cover Letter**
The Consultant shall include a cover letter of interest and transmittal not to exceed two pages in length, and which contents shall indicate an agreement to perform all tasks identified in The Scope of Work Section 1.3 of this RFP.
- **Executive Summary**
The Consultant shall provide a summary of qualifications, related experience, and references.
- **Project Team / Management**
The Consultant shall provide their proposed project team organization chart of all individuals and firms involved in this project, as appropriate, with roles and responsibilities defined. Specify who will be responsible for meeting goals, keeping the project within the contracted cost, and keeping the project within the scope of work outlined in the RFP. The Consultant shall also outline how timetables and deliverables will be defined, tracked, and reported to the Town. Include brief resumes for all key individuals identifying their qualifications and experience. Highlight the person intended to be the project manager for the Strategic Planning Services and provide a list of recently completed projects relevant to the scope of this RFP.
- **Legal and Character**
The Consultant shall describe if and how their firm is involved in any pending claims or lawsuits.

3.4.2. Evaluated Technical Requirements

After agreeing to meet the mandatory technical requirements of the RFP, the following capabilities and qualifications will be scored during technical evaluation:

- **Approach**
Proposals shall provide a clear articulation to the firm's technical approach to be used in this project, including a detailed description of the proposed methods of public involvement, a proposed schedule of public engagement, and how the

Town would contribute to the firm's successful approach.

- **Availability**

Proposals shall describe the availability of the Consultant's resources to mobilize and an estimated timeline to initiate Strategic Planning Services. Also, Proposals shall describe the availability of the Consultant's resources to provide a dedicated and continuous team towards completion of all planning efforts.

- **Project Management**

Proposals shall describe in sufficient detail the proposed scope of work, project approach, and methodology in managing and implementing a project of this size and scope. Key elements should include project understanding, project methodology and deliverables, roles and responsibilities, and a staffing plan.

- **Expertise**

Proposals shall include a list of three (3) examples of relevant written work related to strategic planning, with no less than one example prepared on behalf of a local government organization or comparable entity.

- **Partnership**

Proposals shall include how and why the Consultant's firm or project team would be a good strategic planning services partner with the Town; define reporting measures to be employed that will help ensure the likelihood of success in this project; explain how the company is qualified to meet the requirements of this RFP.

3.4.3. Technical Proposal Format

The Consultant shall provide responses to all of the above Technical Requirements plus any additional supporting documentation. The technical proposal shall be formatted as follows. If not submitted in the required format, the proposal may not be considered.

- Consultants shall provide in their Technical Proposal all documents listed in Section 3.2.1.
- Proposals shall be based only on the material contained in this RFP. The RFP includes official responses to pre-proposal conference questions, addenda, and any other material published by the Town pursuant to the RFP.

3.5. PRICE PROPOSAL REQUIREMENTS

Each Consultant is required to submit a Price Proposal as part of the overall response. By submitting a response, the Consultant agrees that it has read, understands, and will abide by the following instructions/rules:

1. The submitted Price Proposal must include all costs pursuant to the final Agreement.
2. Price proposals that do not fully meet the requirements defined in the RFP, as determined by the evaluation team, may be treated as non-responsive and may not be considered for award.
3. The prices quoted and listed in the Price Proposal shall be firm throughout the Term of the Agreement, if selected for contract award.
4. For the purposes of the work to be performed, Consultant shall be responsible for all travel and per diem incurred in the performance of this Agreement. Therefore, any such expenses shall be included in the prices and should not be presented as separately payable items.

3.5.1. Cost Proposal Structure

There is no specific worksheet, however, Consultants shall consider all costs (labor, material, overhead, administration, profit, travel, etc.) associated with providing the services listed in Section 1.3 as will be accomplished and described in its technical proposal. The Town anticipates ordering all tasks; however, it reserves the right to modify the tasks described in Section 1.3.

Proposed fees should be listed by phase and task, as well as a total for all phases and tasks. The Town of Shrewsbury reserves the right to request a specific breakdown of item costs within each task. Costs shall be inclusive, with printing, copying, postage, deliveries, travel and all other categories included.

4. APPENDICES

4.1 STATEMENT OF TAX COMPLIANCE FORM - MGL Ch. 62, Sec. 49A

4.2 CERTIFICATE OF NON-COLLUSION FORM

4.3 SAMPLE AGREEMENT

4.1 STATEMENT OF TAX COMPLIANCE FORM - MGL Ch. 62, Sec. 49A

CERTIFICATION AS TO PAYMENT OF STATE TAXES

Pursuant to Chapter 62C of the Massachusetts General Laws, Section 49A(b), I,

_____, authorized signatory for the Contractor do hereby certify under the pains and penalties of perjury that said Contractor has 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 of Individual or
Corporate Name

By: _____

Corporate Officer
(if applicable)

4.2 CERTIFICATE OF NON-COLLUSION FORM

CERTIFICATE OF NON-COLLUSION

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

Name: _____

Title: _____

Business Name: _____

4.3 SAMPLE AGREEMENT

AGREEMENT FOR STRATEGIC PLANNING SERVICES

The following provisions shall constitute an Agreement between the Town of Shrewsbury, acting by and through its Town Manager, hereinafter referred to as "Town," and _____, with an address of _____, hereinafter referred to as "Contractor", effective as of the ____ day of _____, 201___. In consideration of the mutual covenants contained herein, the parties agree as follows:

ARTICLE 1: SCOPE OF WORK:

The Contractor shall perform all work and furnish all services necessary to provide the Town with consulting services related to community-wide strategic planning, including the scope of services set forth in Attachment A.

ARTICLE 2: TIME OF PERFORMANCE:

The Contractor shall complete all work and services required hereunder commencing February, 2018 through March 2019.

ARTICLE 3: COMPENSATION:

The Town shall pay the Contractor for the performance of the work outlined in Article 1 above the contract sum of \$_____. The Contractor shall submit monthly invoices to the Town for services rendered, which will be due 30 days following receipt by the Town.

ARTICLE 4: CONTRACT DOCUMENTS:

The following documents form the Contract and all are as fully a part of the Contract as if attached to this Agreement or repeated herein:

1. This Agreement.
2. Amendments, or other changes mutually agreed upon between the parties.
3. All attachments to the Agreement, including Attachment A, the Request for Proposals.

In the event of conflicting provisions, those provisions most favorable to the Town shall govern.

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ARTICLE 5: CONTRACT TERMINATION:

The Town may suspend or terminate this Agreement by providing the Contractor with ten (10) days written notice for the reasons outlined as follows:

1. Failure of the Contractor, for any reason, to fulfill in a timely and proper manner its obligations under this Agreement.
2. Violation of any of the provisions of this Agreement by the Contractor.
3. A determination by the Town that the Contractor has engaged in fraud, waste, mismanagement, misuse of funds, or criminal activity with any funds provided by this Agreement.

Either party may terminate this Agreement at any time for convenience by providing the other party written notice specifying therein the termination date which shall be no sooner than thirty (30) days from the issuance of said notice. Upon receipt of a notice of termination from the Town, the Contractor shall cease to incur additional expenses in connection with the Agreement. Upon such termination, the Contractor shall be

entitled to compensation for all satisfactory work completed prior to the termination date as determined by the Town. Such payment shall not exceed the fair value of the services provided hereunder.

ARTICLE 6: INDEMNIFICATION:

The Contractor shall defend, indemnify and hold harmless the Town and its officers, agents, and all employees from and against claims arising directly or indirectly from the contract. Contractor shall be solely responsible for all local taxes or contributions imposed or required under the Social Security, Workers' Compensation, and income tax laws. Further, the Contractor shall defend, indemnify and hold harmless the Town with respect to any damages, expenses, or claims arising from or in connection with any of the work performed or to be performed under this Agreement. This shall not be construed as a limitation of the Contractor's liability under the Agreement or as otherwise provided by law.

ARTICLE 7: AVAILABILITY OF FUNDS:

The compensation provided by this Agreement is subject to the availability and appropriation of funds.

ARTICLE 8: APPLICABLE LAW:

The Contractor agrees to comply with all applicable local, state and federal laws, regulations and orders relating to the completion of this Agreement. This Agreement shall be governed by and construed in accordance with the law of the Commonwealth of Massachusetts.

ARTICLE 9: ASSIGNMENT:

The Contractor shall not make any assignment of this Agreement without the prior written approval of the Town.

ARTICLE 10: AMENDMENTS:

All amendments or any changes to the provisions specified in this Contract can only occur when mutually agreed upon by the Town and Contractor. Further, such amendments or changes shall be in writing and signed by officials with authority to bind the Town. No amendment or change to the contract provisions shall be made until after the written execution of the amendment or change to the Contract by both parties.

ARTICLE 11: INDEPENDENT CONTRACTOR:

The Contractor acknowledges and agrees that it is acting as an independent contractor for all work and services rendered pursuant to this Agreement and shall not be considered an employee or agent of the Town for any purpose.

ARTICLE 12: INSURANCE:

The Contractor shall be responsible to the Town or any third party for any property damage or bodily injury caused by it, any of its subcontractors, employees or agents in the performance of, or as a result of, the work under this Agreement. The Contractor and any subcontractors used hereby certify that they are insured for workers' compensation, property damage, personal and product liability. The Contractor and any subcontractor it uses shall purchase, furnish copies of, and maintain in full force and effect insurance policies in the amounts here indicated.

General Liability

Bodily Injury Liability:	\$1,000,000 per occurrence
Property Damage Liability	\$ 500,000 per occurrence
(or combined single limit)	\$1,000,000 per occurrence

Automobile Liability

Bodily Injury Liability:	\$1,000,000 per occurrence
Property Damage Liability	\$ 500,000 per occurrence
(or combined single limit)	\$1,000,000 per occurrence

Workers' Compensation Insurance

Coverage for all employees in accordance with Massachusetts General Laws

Professional Liability Insurance

Minimum Coverage	\$1,000,000 per occurrence
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Prior to commencement of any work under this Agreement, the Contractor shall provide the Town with Certificates of Insurance which include the Town as an additional named insured and which include a thirty day notice of cancellation to the Town.

ARTICLE 13: SEVERABILITY:

If any term or condition of this Agreement or any application thereof shall to any extent be held invalid, illegal or unenforceable by the court of competent jurisdiction, the validity, legality, and enforceability of the remaining terms and conditions of this Agreement shall not be deemed affected thereby unless one or both parties would be substantially or materially prejudiced.

ARTICLE 14: ENTIRE AGREEMENT:

This Agreement, including all documents incorporated herein by reference, constitutes the entire integrated agreement between the parties with respect to the matters described. This Agreement supersedes all prior agreements, negotiations and representations, either written or oral, and it shall not be modified or amended except by a written document executed by the parties hereto.

ARTICLE 15: COUNTERPARTS:

This Agreement may be executed in any number of counterparts, each of which shall be deemed to be a counterpart original.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed on the day and year first above written.

CONTRACTOR

TOWN OF SHREWSBURY

By

by its Town Manager

Kevin J. Mizikar

Printed Name and Title