



Boothbay Comprehensive Planning Committee

REQUEST FOR PROPOSALS

For

Comprehensive Plan Consulting

November 1st, 2012

Comprehensive Planning Committee

Background

The Town of Boothbay Comprehensive Planning Committee is seeking the services of a consulting firm or consulting team (the “Consultant”) to assist the Town’s Comprehensive Plan Committee (the “Committee”) in developing a new Comprehensive Plan for the Town of Boothbay (the “Plan”). The current plan was originally adopted in 1989 and is out of date. In addition, the State Planning Office has indicated, previously, that the Growth Management Act certification for the current plan will expire and that a new plan should be developed to maintain certification.

Guiding and overseeing the development of the Plan, the Committee consists of 13 individuals, a Selectman, a Planning Board member; a Port Committee member, two utility representatives, two School Board members, and five residents with business and conservation experience. The Town Manager, James D Chaousis II, is the primary staff person responsible and will participate in the process.

The Committee has been meeting for a couple of months and has done some of the preliminary discussions on how the Plan should be developed. It will meet regularly on the 1st and 3rd Monday of the month until project completion. The meetings have been held between the hours of 6 pm to 8 pm in the Town of Boothbay Town Office Meeting Room. The meeting is subject to change if approved by the majority of the Comprehensive Planning Board members. Additional meetings for public participation events as well as occasional Planning Board and Selectmen meetings are expected.

The current Comprehensive Plan is available for review upon request. It is a well written document and the Committee has discussed retaining all of the usable information for reuse. The general approach will be to develop a fresh Plan but relevant and useful portions of the exiting Comprehensive Plan may be carried over into the new Plan

Description of Services Requested

There are a variety of ways to approach the development of comprehensive plans, and the one used by Boothbay will be the result of interactions between the Committee, Consultant, staff, and the public. While it is not possible, therefore, to precisely anticipate all aspects of the needed services, the consulting services requested in general are to:

- Assist the Chairperson and the Town Manager in facilitating Committee meetings and public participation events;
- Assist the Committee in developing and implementing the technical and citizen participation processes necessary for creating the Plan and achieving its adoption by the Board of Selectman and Town Meeting;
- Assist in ensuring the new Plan meets the requirements of the Growth Management Act and all other pertinent laws that apply to Comprehensive Planning and growth;

In order to accomplish the development of the Plan, a number of different skill sets or areas of expertise likely will be needed. Toward this end the Committee may seek to use different consultants under separate contracts, or it may prefer to select a single consulting firm or team that combines the needed abilities. In

connection with this request for Qualifications, the skills or knowledge that the Consultant must possess include but are not limited to those associated with (in no particular order):

- **Visioning, public education, and public participation.** Efficient a defective means are necessary for both providing information to the Committee and the public and for collecting information on informed/knowledgeable preferences. This includes:
 - **Graphics.** In connection with visioning, graphics such as photo-simulations have proven to be powerful tools in helping people see future possibilities.
 - **Charrettes.** A possible tool for citizen input.
 - **Surveys.** Another potential citizen input tool.
- **Economics, real estate, and municipal finance.** The Consultant must be able to describe and predict under alternative scenarios the interrelations between land preservation, redevelopment, municipal services, tax base and tax rate. For instance, the Committee may want to know, assuming no great changes in State funding formulas or other trends, what alternatives in new housing, office, commercial, techno-industrial, or other land uses would be necessary to support existing levels of municipal services without significant increases in the property tax.
- **Region knowledge.** The solutions to municipal problems increasingly are regional in nature.
- **Land use/transportation connection.** What are the opportunities for achieving desired land use and living scenarios with alternative modes of transportation?
- **Sustainability.** What actions must be taken in the areas of energy, environment, climate change, green building design, food production and related matters to ensure local sustainability?
- **Zoning.** Given that the Comprehensive plans are the legal foundation for zoning, a high level of zoning expertise is required.

Other skill sets or knowledge that the Committee may decide to seek from the Consultant or others include but are not limited to:

- **Community Development.** To the extent, if any, that there is a desire and opportunity to intensify selected areas of Boothbay, such as the Industrial Park Zone or the Village District, the need for forward thinking planning will be necessary to not outgrow the visioning statements.
- **Form-Based Zoning.** Form-based zoning has been discussed and may become relevant for certain parts of Boothbay.

Consultant Response

For further information about this Request for Proposals, please contact James D Chaousis II, Town Manager, at townmanager@townofboothbay.org.

A non-mandatory pre-response meeting will be held on October 29th, 2012, 6:00 pm to 8:00 pm, at the Town Office Meeting Room, 1011 Wiscasset Road Boothbay, Maine. Please notify if you plan to attend.

A **mandatory** letter of intent to bid must be received at the address below on or before October 29th, 2012 by 4:30 pm. Please, label as: Comprehensive Plan Consulting RFP. **Proposals must be received at the address below on or before November 20th, 2012 by 4:30 pm.** Late proposals will not be accepted.

Please submit fourteen (14) responses to the “Consultant Profile” with one clearly marked as “ORIGINAL”, fourteen (14) copies of a sample comprehensive plan conducted by a person who will be a member of the Consultant firm or team; and the names, email addresses, and phone numbers of three references.

Please hand deliver or mail in a sealed envelope to:

Town of Boothbay
Attn: Comp Plan RFP
1011 Wiscasset Road
PO Box 106
Boothbay, ME 04537

Consultant Profile

Please number and re-state each subheading and question, followed by your response. Answer all questions or state “N/A” if not applicable. Please number all pages.

1. Qualifications and Capability

a. General Firm Information

- i. Structure of Firm (corporation, partnership, sole proprietorship, joint venture).
- ii. Year Firm Established. Number of years your firm has been in business under its present business name, with a minimum of three (3) years’ experience.
- iii. Other Firm Names. Indicate all other names by which your organization has been known and the length of time known by each name.
- iv. Parent Company. If applicable, state name, and address.

b. Experience of Firm

- i. Years Doing Comprehensive Plans. State the number of years your firm has been involved in doing comprehensive plans.
- ii. Number of Comprehensive Plans. Indicate the names of the comprehensive plans your firm has conducted from 2000 to present.

Indicate whether this was as the lead firm or as a subcontractor. Indicate if any plans failed to achieve approval and why.

- iii. Full-Time and Part-Time Personnel. Indicate separately the number of full-time and part-time personnel employed by your firm in the location of their offices.

c. Financial Information

- i. Statement of Financial Conditions. Attach the most recent annual Statement of Financial Conditions, including balance sheet, income statement and statement of cash flows, dated within the past twelve (12) months.
- ii. Provision of Insurance. Provide a summary of the limits provided by your firm's insurance policies.
- iii. Bonding Capacity. Provide a summary of your firm's total bonding capacity, and your current available bonding capacity.

2. Experience and Expertise (limit to six pages)

a. Comprehensive Plans Conducted.

Please describe two (2) comprehensive or similar plans (e.g., strategic plans, neighborhood plans, etc.) that your firm has conducted over the last ten (10) years. Projects where your firm acted as a subcontractor must be clearly identified. For each project please include the following:

- i. Name, general description of the planning project, and web address if available.
- ii. Community involved.
- iii. Names and email addresses of the current municipal manager/administrator, current Planning Board Chairperson, and the then Chairperson for the project.
- iv. Approach used in the developing the plan and the reasons behind it.
- v. Positive aspects of the planning process.
- vi. Obstacles encountered during the planning process.
- vii. Whether the plan was officially adopted by the municipality.
- viii. Degree of plan implementation following adoption.
- ix. Key recommendations of the plan.
- x. Public participation process used.
- xi. Evidence that your firm's involvement in the project was instrumental in changing the community's mindset about where it wants to be in coming years and how to get there.
- xii. Your firm's total invoiced charges for the project and the source of funds; if applicable, describe your firm's role in securing funds.

b. Personnel Information

- i. Qualifications and Experience. Please provide the names, roles, academic and professional achievements, years of experience, and

- other qualifications of staff who would be assigned to the project.
- ii. Areas of Expertise. List all areas of comprehensive plan related expertise provided by our firm or team. Please refer to the “Description of Services.”
 - iii. Availability. Indicate all other projects being worked on by staff assigned to the project; their availability to work on the project; and the distance of travel from their offices to the Boothbay Town Office.
 - iv. Hourly rates and charges. List the hourly rates for each person assigned to the project, an estimate of the percentage of time each person would be contributing to the project, and your firm’s rates for mileage, telephone, and/or other expenses.
 - v. Subcontractors. Provide the same information above for any subcontractors being used for the project.

Selection Process

The criteria listed below will be used to evaluate written proposals and the subsequent interviews. The scoring weight is listed for each criterion. These criteria will be applied and interpreted solely at the discretion of the Town. Proposals should include all necessary information that is pertinent to these evaluation criteria. Additional information required for proper assessment of proposals may be requested from the proposer at the discretion of Town. The final results will be based on the scoring system, other information obtained or requested by the Interview Team and references. The final results will be submitted to the Town of Boothbay Board of Selectmen for review and acceptance.

The Town of Boothbay will accept proposals that have alternative or unconventional approaches. Please explain why an alternative or unconventional proposal is being proposed and the benefits of the proposal.

Interviews are expected to be conducted in mid-November and the contract to begin in December.

Category	Subcategory	Total Available Points	Scoring Range			
			Highest Level	High Level	Acceptable Level	Poor
Qualifications and Capability						
	Firm Experience	5	5	4	3	1
	Financial stability	5	5	4	3	1
Experience and Expertise						
Plans Conducted						
	Planning Project 1	10	10	8	6	3
	Planning Project 2	10	10	8	6	3
Personnel Information						
	Qualifications and Experience	25	25	20	15	8
	Areas of expertise	15	15	12	8	4
	Availability	5	5	4	3	1
	Hourly rates and charges	15	15	12	8	4
	Interview	10	10	8	6	28
	Total Point	100	100	80	58	28