

The City of Waltham, acting through the City Council's Fernald Use Committee, seeks proposals from professional, multi-disciplinary planning firms or teams (hereinafter referred to as the Consultant) to prepare a Fernald Framework Plan (FFP) including a Development Requests for Proposals Package and Zoning/Design Standards for the Fernald Development Center. The planning process is expected to take less than one year and the initial allocated budget is \$250,000; additional funding may be authorized with sufficient justification and approval by the City Council and the Mayor of Waltham.

Proposals must be submitted in two separate sealed envelopes marked "Fernald Framework Plan - - Response and Qualifications" and "Fernald Framework Plan - Price". See Section ___ for details. Proposals must be received by 12:00 p.m. on _____. Late proposals will be returned unopened.

Proposals are to be sent to:

Mr. Joseph P. Pedulla
Chief Procurement Officer
Waltham City Hall
610 Main Street
Waltham, MA 02452

The contract awarding authority is:

City of Waltham
610 Main Street
Waltham, MA 02452

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INTRODUCTION

Waltham Massachusetts is a diverse community with a population of 63,000 with two universities and a large industrial base along Route 128. For many years, Waltham was also home to a number of mental health and developmental disability facilities along Trapelo Road. These sites have closed over the years, and the former sites have been converted to open space and some housing. In December, 2014, the City was able to purchase the Fernald Development Center, a 190 acre site that is covered with ___ buildings, some that date back to 1890, wooded areas, wetlands and open fields. Approximately 140 acres were purchased with Community Preservation Funds for opens space/recreation and historic preservation while the remaining 50 acres were purchased with unrestricted City funds. The challenge is to determine the best uses for the property. As the late City Councillor Tom Curtin said, “As goes Fernald, so goes Waltham.” (Confirm quote.)

The Fernald site is listed on the National and State Registers of Historic Places, and contains a lawn that has been classified as an historic landscape. The oldest building on the site, the West Building, was built by Fernald residents in 1880, and there are at least 45 historic buildings to be considered for rehabilitation or demolition. There are also a number of more modern buildings that were constructed in the 60’s, 70’s and 80’s that have been or may be demolished.

The City of Waltham is seeking a Consultant who can facilitate the creation of a conceptual re-use scenario for this land, while considering the existing adjacent neighborhoods, roads and other nearby open spaces. The City’s intention is to identify the best potential uses for the property relative to local objectives and the restrictions imposed by the Community Preservation Act and the Memorandum of Agreement between the City and the Massachusetts Historical Commission. Once the best use scenarios have been identified, implementation plans, design & zoning guidelines and an RFP for re-use development will be created.

More information on the property and project may be found in the documents on the City’s website at _____. These documents include maps, studies and the results of community meetings. (A website will need to be created that will include Fernald Re-Use Committee work and more recent information in order to achieve the robust public input, interaction, reporting and review that the City is seeking.)

I. PURPOSE OF RFQ

The City of Waltham, acting through the City Council’s Fernald Use Committee, seeks proposals from professional, multi-disciplinary planning firms or teams (hereinafter referred to as the Consultant) to prepare a strategic reuse plan for the Fernald Development Center site. The planning effort is expected to take less than one year and the initial allocated budget for the master planning process is \$250,000. Additional funding may be allocated if justified to facilitate comprehensive reuse planning. The planning process will incorporate the following elements:

- Analysis of existing materials and reports,

- A pro-active stakeholder involvement process for Waltham residents, the Mayor, City Council and City boards, commissions and departments, and the Massachusetts Historical Commission.
- Reuse strategies will consider the impacts on, and coordinate with, surrounding neighborhoods and open spaces and the rest of Waltham.
- Evaluation of a wide range of potential land uses for their ability to provide long-range economic and community benefits, while preserving the character of the site and the area.
- Sensitivity to the mixed history of the Fernald and respect for the thousands of residents who lived on the site for over a century.
- Incorporation of the following agreed concepts and ideas:
 - Mayor of Waltham’s “Recommended Master Plan for the Fernald Property”, Dated November 22, 2017.
 - Any approved or submitted City Council Resolutions concerning the property.
 - Daylighting of the culverted stream running through the property and the restoration of historic pond(s).
 - An extension of the Western Greenway running along the western edge of the property.
 - A buffer of recreational land along Trapelo Road.
 - Conducting a Natural Inventory, (as outlined by an approved City Council Resolution)

The plan of work will include:

- Determination of additional Information Requirements/Studies Requirements
- Evaluation of Existing Resources and Infrastructure
- Public Participation Program
- Development of a Vision Analysis setting forth an array of achievable goals for the campus
- Review and analysis of the Federal, State and Municipal regulatory requirements that will impact any future use plan for the property
- Conceptual land use scenario development
- Presentation of a traffic and transportation plan that addresses onsite and offsite traffic issues
- Evaluation of financial implications for the City
- Zoning and Design Guidelines development
- Recommendation of timetable and synergies that can be achieved by phased and structured repurposing effort for this historic campus
- Implementation Program and Funding Resources
- Preparation of development RFP package.

II. SITE VISIT AND PRE-BID MEETING

An informational site visit will be held on _____ at 10:00 am. Please RSVP to Joseph P. Pedulla, Chief Procurement Officer, at jpedulla@city.waltham.ma.us or (781) 314-3244.

A non-mandatory pre-bid scoping meeting will be held after the site visit on _____ at 12:00 pm to provide an opportunity for consultants to ask questions. Please RSVP to Joseph P. Pedulla, Chief Procurement Officer, at jpedulla@city.waltham.ma.us or (781) 314-3244.

Questions regarding the project may be submitted in writing to Joseph P. Pedulla, Chief Procurement Officer, at jpedulla@city.waltham.ma.us or (781) 314-3244. Questions should be emailed, and should be submitted any time prior to 12:00 pm on _____.

Please submit a letter of interest to jpedulla@city.waltham.ma.us if you wish to receive RFQ updates and/or Questions and Answers.

III. SCOPE OF SERVICES AND DELIVERABLES

The selected Planning Firm shall work closely with City departments including the City's Purchasing Agent, Community Preservation Commission, Engineering Department, Water Department, Consolidated Public Works, Wires Department, Traffic Commission, Conservation Commission, Historic Commission, Police Department, Fire department, Recreation Department, Planning Department, the City Council's Fernald Use Committee and the Mayor. The main contact will be a Planning Committee that would include representatives of the Mayor, the City Council and citizens named by the Council and approved by the Mayor. The Planning Director would chair the committee

The City may at the time of contract issuance, create a full or part time municipal position to administer this contract. This position could fill the role of City Planner, Assistant City Planner, Owners Project Manager or similar. The position created will act as the permanent city office personnel coordinating the efforts between the Council, Mayor and the Consultant, and will be responsible for engaging other City boards, commissions and departments.

This Scope of Services has been prepared to analyze the existing 190+/- acre Fernald parcel and adjacencies, both publicly and privately owned; to develop, through a community engaged design process, the potential use for the property. This Scope attempts to identify the steps needed to first analyze the property, then collect public input, then develop concepts, then create consensus through collaborative work sessions surrounding the concepts. The deliverable shall be a graphic representation of the proposed master plan and an economic plan for the proposed uses. The Fernald Framework Plan, (FFP) shall generally include the following scope items:

1) Site Inventory and Analysis

- a) Topographic and property line survey
 - i) Include "Forest Street Park" and the contiguous edge of "Veterans Fields"
 - ii) Include existing easements
 - iii) Include utilities and buildings
- b) Historic analysis of the buildings and grounds
 - i) Base on MOA with Massachusetts Historic and City of Waltham (Middlesex South County Registry of Deeds – Book 64704 – Page 459)
- c) Building condition assessment including structural evaluation and issues and compliance with State and Municipal Regulatory requirements
- d) Infrastructure condition assessment
 - i) Storm water / Drainage master plan
 - ii) Utilities
 - iii) Roads, bridges and culverts
- e) Environmental assessment
- f) Natural Inventory, (as outlined by an approved City Council Resolution)

2) Develop Design Guidelines

The Consultant will create draft amendments to the Waltham Zoning Code to allow the conceptual uses proposed in the Framework Plan. The Consultant will support the approval and adoption of the proposed zoning modification by City Council. The Consultant will also highlight sections of the existing zoning bylaw that may conflict with or prevent desirable outcomes. The Consultant will produce design guidelines and a proposed review process for permitting potential reuse projects.

3) Create Conceptual Plans and Economic Analysis

The Consultant will collaborate with the Planning Committee] and City staff to develop a comprehensive Framework Plan for the property. The Framework Plan will contain both a land use concept design that identifies how the properties and buildings will be used and an implementation strategy that addresses how the plan will be implemented to achieve maximum success. The Master Plan will be submitted for approval to Waltham City Council and thereafter will be presented to City boards and residents in a public meeting.

The Consultant will, to the maximum extent feasible, utilize existing information, reports, and studies provided by the City. The Consultant will build upon these resources through meetings with the Planning Committee and public outreach to establish reuse and planning principles, objectives and goals for the Master Plan. A fully integrated concept plan for the property and nearby City lands will be developed based on scenarios prepared by the Consultant in close coordination with the Planning Committee. Refinement of the scenarios will involve the Planning Committee, the City Council's Fernald Use Committee, Mayor, and community feedback in an iterative process to create the conceptual plan for land reuse that optimizes realization of the following City objectives:

- a. Maintain and enhance the character and values of the City of Waltham and its residents
 - Preserve the scenic, natural, cultural and historic characteristics of the site and adjacent properties
 - Complement the natural open spaces surrounding the property including the Western Greenway Trail, Forest Street Park, Veterans Fields and the proposed MCRT, (Wayside Rail Trail).
 - Provide additional recreation resources and uses to the extent feasible and desired.
 - Develop the Stream Daylighting and drainage improvements previously studied by the City.
 - Preserve, restore and adaptively reuse selected historic buildings to the extent feasible and financeable, considering both capital and operating costs.
 - Integrate the adjacent former Lawrence School property into the plan
 - Others??
- b. Upgrade City housing inventory and address underserved housing needs

- Provide a range of market-based housing opportunities to meet projected needs as determined by analysis of demographic and economic trends.
 - Develop affordable housing that addresses Chapter 40B mandate consistent with a City-wide affordable housing plan.
 - Address veterans housing needs for male and female veterans.
 - Others??
- c. Achieve reasonable economic and financial impacts on Waltham residents and City services
- Balance additional demands for City services against additional tax revenue generated for the City.
 - Develop and outline a program of potential revenue sources from the repurposing of the property
 - Determine economic impacts on Transportation infrastructure, medical services infrastructure and other emergency services.
 - Minimize significant capital outlays by the City in achieving desired reuse
 - Incorporate all available federal and state funding and tax incentives to enhance the ability to achieve other City objectives.
 - Others??
- d. Incorporate into the planning effort the examination of using facilities for the following potential uses:
- Provide for new facilities for the Consolidated Public Works Department
 - Provide for repurposing of portions of the campus for use by the Recreation Department
 - Provide for use of appropriate portions of the campus for use by the Cemetery Department
 - Provide for use of appropriate portions of the campus by the School Department
 - Provide for use of appropriate portions of the campus by the Public Safety Department (Fire and Police)

An essential element of achieving objective “c” above, is preparation of an economic model that quantifies the financial outcomes for each proposed conceptual reuse scenario. The financial analysis will include the following:

- a. An investigation of the financial viability for selected public/private models in which the City and private business can share in the costs and benefits.
- b. An analysis of costs associated with a baseline “status quo” scenario to determine municipal carrying costs of doing nothing or capital costs of demolition to create more open space.
- c. An examination of impacts of new development on City resources, and adequacy of existing public facilities and services for future needs.
- d. An analysis of the availability and potential applicability of federal and state funding resources including housing programs, federal and state historic rehabilitation tax credits, Chapters 40R and 40S Compact Neighborhoods

funding, MassWorks Infrastructure Grants, Brownfield Redevelopment Funds, etc.

The following outline is offered to describe the general extent of conceptual design services to be provided by the Consultant. This outline is not necessarily all-inclusive and the Consultant should include in the proposal any tasks or services deemed necessary to satisfactorily complete the project. Consultants are encouraged to bring expertise gained from other projects, creative ideas tested elsewhere, and best practices applicable to this project.

The Consultant will create an effective public outreach program to ensure full stakeholder involvement at the optimal points in the design process. The FFPRC envisions that these outreach activities can include public workshops, forums, stakeholder meetings, surveys, public meetings, televised interviews, social media outreach, etc. Approximately 12 committee meetings and public events are anticipated, but will be determined mutually with the Committee and Consultant to successfully fulfill the objectives of this effort. The Consultant will keep meeting minutes and summarize meeting outcomes back to the Committee.

4) Disposition Plan

The Consultant will develop a recommended Framework Plan implementation strategy that optimizes project success and reduces implementation risks. The Framework Plan will be sensitive to the financial and other requirements of the Land Disposition Agreement with DCAMM (Middlesex South County Registry of Deeds – Book 64704 – Page 433) in analyzing and presenting the plan. Approaches to be considered include disposition of the entire site to a single master developer versus a phased implementation using smaller disposition parcels conveyed to multiple City of Waltham departments or developers. If a phased implementation strategy is recommended, site parcel subdivision plans to support phased implementation will be developed. If removal of buildings is required, a plan will be developed for how and when such building(s) will be demolished, including hazardous materials abatement and debris removal.

A schedule of date-specific key activities and milestone attainment will be developed consistent with the recommended strategy, along with an RFP package(s) for reuse/disposition of the property.

IV. FORMAT AND MEDIA

Ten (10) color copies and one unbound version of the deliverables are required at each phase. The digital source files of each phase's final deliverables must be provided on a CD, DVD, or USB compatible hard drive (2 sets). All materials, and copyright thereof, will become the property of the City of Waltham. The electronic deliverable set shall include:

- final document as a PDF and in its native file format
- all GIS or CAD data created by the Consultant and used in maps in the final version

- all source text in a Microsoft Word compatible file format
- all tables, calculations, spreadsheets and graphs in Microsoft Excel compatible format
- all images and diagrams in their native file format plus as a high-res JPEG
- all videos, web pages, et al that may be developed as a deliverable

V. STAFF ROLE

The Consultant will work closely and in harmony with the Committee and be a resource to the Committee, including attending Committee meetings, supporting and moderating public meetings and forums, preparing background research and reports, and at all times understand the direction and take guidance from the Committee with respect to the planning process and objectives and the development of the Framework Plan. A primary liaison person, either a municipal employed city planner or contracted Owners Project Manager, will be selected by the Committee for coordination with the Consultant and the city.

Municipal staff will also be closely involved, but the Consultant is expected to devote the time needed to conduct research, write documents, and participate in meetings as needed with the Committee and the public. Staff will take primary responsibility for scheduling and posting meetings and will attend all meetings. Staff will provide base data and maps as available.

VI. PROJECT SCHEDULE

Work is expected to start in July 2018 and the Framework Plan will be ready for adoption in winter 2019 with the balance of work to be completed by early 2020 or sooner. The Consultant should demonstrate the ability to complete the project on schedule or explain why a departure from the proposed schedule is recommended. If the Consultant believes that the project, or specific project components, can be accelerated in advance of the schedule above, the accelerated schedule should be outlined in the response.

VII. PROJECT BUDGET

The Consultant shall submit an estimated price summary for each phase individually and an aggregate for all phases. The City reserves the right to retain separate consultants for one or more but not necessarily all phases of the project. However, it is our goal for the entire process to be completed by one Consultant. It is the desire of the City that this contract will be a firm, fixed price agreement. Bidders are encouraged to provide comment as to whether the initial allocation of funds is sufficient to complete all phases in the Scope of Work.

VIII. CONSULTANT QUALIFICATIONS

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

- A. The firm/team should demonstrate the ability to bring creative responses to master planning complex multi-use projects and have significant experience in design, site planning, public policy, sustainability planning, project financial analysis and outcomes based on various

development scenarios, experience with various governmental agencies, private development, public-private partnerships, public and private funding sources, historic preservation/renovation, and architecture.

- B. The firm/team should have previous experience in managing public information processes, conducting reuse planning processes and preparing master reuse or redevelopment plans. The firm/team should have completed two (2) such projects of similar size and scope.
- C. The firm/team should be professionally responsible and attentive. The volume of the 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.

IX. CHECKLIST / PROPOSAL SUBMISSION REQUIREMENTS

Proposals must be submitted in two separate sealed envelopes marked "Fernald Framework Plan – Response and Qualifications" and "Fernald Framework Plan – Price", see Selection Process and Criteria section below. Proposals must be received by 12:00 p.m. on May 31, 2018. Late proposals will be returned unopened.

Responses 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 response 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.

The Planning Committee and representatives of the Fernald Use Committee will be convened to review responses. Finalists will be invited to review their Responses in an interview with the entire Committee.

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

Proposals are to be sent to:

Mr. Joseph P. Pedulla
Chief Procurement Officer
Waltham City Hall
610 Main Street
Waltham, MA 02452

Interested firms must submit three (3) copies (and one (1) electronic copy on disc) of its response addressing the objectives, scope and schedule described in this RFQ. Responses must include, at a minimum, each of the following:

A. Sealed Submission, clearly marked "Fernald Framework Plan – Response and Qualifications"

1. General description of the firm/team's experience.
2. Description, with examples, of the firm/team's experience in working with municipalities preparing comprehensive or strategic reuse plans, and conducting public meetings. Include reference to your experience in (1) use of visual materials to illustrate proposed future development scenarios, and (2) public outreach materials and community relations, public speaking, facilitation and consensus building.
3. A comprehensive implementation plan 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.
4. An outline of the schedule for completion of tasks (timeline) as presented in the firm/team's approach to the scope of services.
5. Description of the assigned staffs' experience, educational background, availability, and chain of responsibility, including the name and title of the principal and project manager assigned to the project, names of all sub-consultants, and resumes of all personnel to be associated with the project.
6. List of references, including name, title, agency, address, project cost, and telephone number for similar projects completed (including dates). For teams assembled from multiple firms submit at least three (3) letters of reference with contact information from each firm on the team.
7. Other pertinent information about the firm(s) that would aid the City in making a selection.
8. Completed Attachment A Tax Compliance Form and Attachment B Non-Collusion Affidavit.
9. Evidence of insurance coverage, including general and professional liability and worker's compensation insurance.

B. Sealed Submission, clearly marked "Fernald Framework Plan – Price".

Completed Attachment C: Price Form

X. SELECTION PROCESS AND CRITERIA

RFQ Selection Schedule (SAMPLE)

- RFQ release: November 1, 2018
- Ad in Central Register: November 8, 2018
- Two ads in Waltham Tribune: November 1 & 8, 2018
- Site visit/meeting: December 3, 2018
- Questions due: December 10, 2018
- Answers posted: December 17, 2018
- Proposals due: January 31, 2019
- Committee – Shortlisted Consultants Notified: February 15, 2019
- Committee – Shortlisted Consultant Interviews & Selection: March 1, 2019
- Committee award notification to selected Consultant: March 8, 2019
- Committee Consultant selection recommendation to City Council & contract execution by City Council: April 1, 2019
- Work commences: April 8, 2019

The City 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.

RFQ Selection Criteria (SAMPLE) WALTHAM STANDARD?

A. Detailed Methodology for undertaking this project, including the work breakdown structure, identification of the critical path, major risk factors and risk mitigation approaches. (25%)

(HA) Highly Advantageous: The plan of services proposes a detailed, logical, credible, creative, and highly efficient scheme for producing a complete project that addresses all of the required issues.

(A) Advantageous: The plan of services proposes a credible scheme for producing a complete project that addresses all of the required issues.

(NA) 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.

(U) Unacceptable: The plan of services does not meet all the minimum applicant qualifications detailed in "Consultant Qualifications".

B. Staffing Plan for undertaking this project, 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 other key personnel, and any

Consultants to be assigned to the Project, including professional registration of the Consultants and their qualifications. (15%)

(HA) Highly Advantageous: All project team members have requisite training in their area of expertise and have demonstrated successful performance with excellent client satisfaction on several prior projects.

(A) Advantageous: Most project team members have requisite training in their area of expertise and have demonstrated successful performance with excellent client satisfaction on several prior projects.

(NA) Not Advantageous: Some project team members have requisite training in their area of expertise and have demonstrated successful performance with excellent client satisfaction on several prior projects.

(U) Unacceptable: The project team does not have sufficient expertise and experience in this type of project.

C. Depth of experience with similar projects, and prior experience with public contracts and relevant codes, laws, and regulations. (25%)

(HA) 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.

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

(NA) 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.

(U) 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 City as evidenced by direct involvement in (1) projects utilizing innovative zoning techniques (2) projects utilizing public-private ventures or innovative economic development practices, and (3) projects utilizing mixed-use, smart growth revitalization strategies. (15%)

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

(A) Advantageous: Involvement in each of the three types of projects specified.

(NA) Not Advantageous: Involvement in at least two of the three types of projects specified.

(U) Unacceptable: Involvement in no more than one of the three 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. (10%)

(HA) Highly Advantageous: More than three clients who consider your services satisfactory or better.

(A) Advantageous: Three clients who consider your services satisfactory or better.

(NA) Not Advantageous: Three or more clients not all of whom consider your services satisfactory or better.

(UA) Unacceptable: Fewer than three clients who consider your services satisfactory or better, or three or more clients who consider your services unsatisfactory.

F. Demonstrated ability to meet project budget and project schedule. (10%)

(HA) Highly Advantageous: All of the Consultant's references indicate that the projects were completed within budget and on schedule or with minimal, insignificant delays.

(A) 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.

(NA) 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.

(U) 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.

XI. CITY OF WALTHAM GENERAL INSTRUCTIONS

City of Waltham Purchasing Department to provide information here

XII. MAPS

Provide accurate map indicating the following:

- **Total property boundary**
- **CPC vs. Non-CPC**
-