



MEMORANDUM

To: Christopher Whelan, Town Manager
Kerry Lafleur, Finance Director
Jon Harris, Budget and Purchasing Administrator

From: Marcia Rasmussen, Elise Woodward, John Boynton, Tori Lambert, Elizabeth Hughes, Sean O'Brien (Review Committee)

Re: RFP #361 – Comprehensive Long Range Plan consultant – recommended award to Civic Moxie

Date: February 2, 2017

The Review Committee for RFP #361 – Consultant for the Comprehensive Long Range Plan recommends that the contract be awarded to Civic Moxie, One Holden Street – Suite 218, Brookline, MA 02445.

On Thursday, December 15, 2016, the Department of Planning & Land Management received three responses to RFP #361 – Consultant for the Comprehensive Long Range Plan. The three lead firms responding to the RFP were:

- Civic Moxie, Brookline, MA;
- Horsley-Whitten Group, Sandwich, MA; and,
- Stantec, Boston, MA.

The above-noted Selection Committee reviewed the proposals for completeness and responsiveness. We then evaluated the proposals using the criteria in the RFP:

1. Number of years the proposer has been in operation,
2. Professional qualifications of staff who will work on the project (please include resumes of the project staff),
3. Experience in projects of similar size and scope,
4. Demonstrated experience in helping communities with the setting of priorities of different (and sometimes conflicting) goals,
5. Ability to complete previous project on budget and on time,
6. Commitment to complete this project in the specified time frame by providing information on your current work load,
7. Quality of proposal,
8. Knowledge and thorough understanding of the structure and functions of local town government in Massachusetts, of the challenges town government faces, and of the

fundamentals of municipal planning and land use regulations and law in Massachusetts as evidenced by submittal of prior work.

9. References (which should be from individuals, firms, and government entities that have hired the proposer for projects with a similar size and scope as this project, conducted during the last five years). Reference information should include contact name, title, and phone number, as well as the project name, organization for whom project was done, and project completion date,
10. Examples of prior work for other municipalities (can be submitted on CD, thumb drive, FTP site or the like, as long as submitted electronically).
11. Proposed schedule and approach to working with the Committee that clearly demonstrates how the Comprehensive Long Range Plan will be developed, and,
12. Presentation of the proposal to Town staff, if requested to do so.

After ranking the proposals (3) highly advantageous; (2) advantageous; (1) not advantageous; and (0) unacceptable, we determined Stantec, was ranked highest at 27; Civic Moxie at 26; and Horsley Whitten Group at 23.

The Review Committee determined that because the proposals and qualifications appeared to be so closely ranked, an interview with all three proposers should be scheduled. These interviews were held on Wednesday, January 11, 2017. After the interviews, individuals were asked to rank the three teams; five of the six reviewers ranked Civic Moxie as #1 and the one had ranked them 2nd.

The price proposals were then opened on January 11, 2017 and the results are as follows:

Name of Firm	Total Price
Civic Moxie	\$175,665
Stantec	\$120,000
Horsley-Whitten Group	\$120,000

While the submitted price proposal by Civic Moxie exceeds the funds identified in the Request for Proposals, the Review Committee determined that the Town should consider whether additional funds may be available and proceed with conducting reference checks for Civic Moxie. The Review Committee felt that the interview with the Civic Moxie team was very dynamic and each member of the team added to the discussion/conversation and response to the questions asked by the Committee – there was a level of energy and excitement that was not experienced during the interviews with the other teams. Civic Moxie identified ways to engage certain age groups/populations that do not regularly participate in planning activities in Concord (ages 20 – 35) in new ways by holding ‘pop-up’ activities during regularly scheduled events (such as July 4th Picnic in the Park, or the West Concord Family Festival) and working through the schools to engage parents. Additionally, Civic Moxie had identified CoUrbanize as a team member that would provide an online community engagement platform that could engage stakeholders in a robust and varied way.

Additional funds were identified by redirecting money from recodification of the zoning bylaw to the comprehensive long range plan effort. Recodification of the zoning bylaw is on hold until the comprehensive long range plan has been completed to address any recommendations

regarding changes to zoning and land use. See the attached memorandum requesting reallocation of funds.

References were checked for Susan Silberberg, Civic Moxie and Karl Seidman. All references called were very positive about the experience working with Civic Moxie and some of its team members:

- Craig Wheeler (former Planning Director for Concord NH/Vision 20/20 Concord NH) worked closely with Susan Silberberg and noted that she was good at engaging the public, delivered items on time, was committed to the project and got it done, understands the public process and brings new ideas to the table.
- Dean Mack (Planner with the City of Bridgeport CT/Waterfront Bridgeport) is working with Civic Moxie now to finalize the project, observed that Civic Moxie really got to know the community and connected with various neighborhood groups so that the plan is being received positively; he commented that Civic Moxie is committed to seeing the plan through and that Susan Silberberg is great at running community meetings because she gets others excited about the planning efforts.
- Josh Reny (Assistant City Manager and Economic Development Director for South Portland ME/South Portland Economic Development Plan) provided reference information about Karl Seidman noting that Karl is good to work with because he is easy to talk with and is responsive to the community; that he did a good job of explaining why the recommendations mattered and how to move forward with those recommendations by discussing added resources needed, providing a realistic time frame and assigning tasks to groups or individuals who would then be accountable to complete the task.

Accordingly, we recommend that the award go to Civic Moxie in the amount of \$175,665.

Approved: _____

Christopher Whelan, Town Manager