

Town of Canton

REQUEST FOR PROPOSALS

Canton Climate Action Plan – Consulting Services

January 22, 2024

RESPONSE DUE: February 20, 2024 at 12:00 PM

Request for Proposals: Canton Climate Action Plan Consulting Services

PART I. GENERAL INFORMATION

I.1 PROCUREMENT DESCRIPTION

The Canton Sustainability and Climate Action Plan (a.k.a., Climate Action Plan or CAP) Interim Steering Committee (a.k.a., Steering Committee or Committee) is requesting proposals from qualified individuals and firms to assist the Committee in developing a Climate Action Plan. This CAP will support ongoing initiatives and meaningfully accelerate our efforts to plan for and address the climate crisis. Specifically, the Town of Canton seeks to develop this CAP, which was approved as part of the [FY 2024 Annual Town Meeting Warrant Article 27](#).¹ This effort is funded through an Executive Office of Energy and Environmental Affairs (EEA) Planning Assistance Grant (ENV 24PLN 01) for Fiscal Years 2024-2025 for a total of \$50,000 plus a \$12,500 in-kind match by the Town of Canton.

Any contract that results from this procurement is anticipated to begin in Q2 2024 and end by no later than June 30th, 2025.

I.2 APPLICABLE LAW

This procurement will be conducted pursuant to Massachusetts General Laws Chapter 30B, Section 6.

I.3 APPROVAL

Any contract that may result from the procurement shall be subject to the approval of the Town of Canton's Select Board.

I.4 INCORPORATION BY REFERENCE

All requirements, specifications, terms, conditions and addenda issued and as described in this Request for Proposals shall be incorporated by reference into any contract that may result.

I.5 TIME FOR AWARD

Any contract that may result from this procurement shall be awarded within forty-five (45) days after the proposal opening. The time for award may be extended for up to 45 days by agreement between the Town and the most advantageous proposer.

I.6 RIGHT TO CANCEL/REJECT

¹ Article 27 sets for the following three objectives: (1) facilitating the development of a Sustainability/Climate Action Plan to help mitigate and adapt to Climate Change, including establishing specific reduction targets in greenhouse gas emissions and making applicable changes to existing governance structures if deemed practical to do so by the Select Board; (2) initiating the consideration of the possible establishment of a new Town Sustainability and Climate Manager position if deemed practical to do so by the Select Board; and (3) initiating the process to identify applicable funding and other responsible economic growth opportunities, if any, to support these sustainability-related efforts.

The Town reserves the right to cancel this RFP or reject in whole or in part any and all proposals if the Town determines that cancellation or rejection serves the best interests of the Town.

1.7 TAXATION

Purchases made by the Town are exempt from the payment of Federal excise tax and the payment of Commonwealth of Massachusetts sales tax and any such taxes must not be included in the bid pricing. Copies of the Town's tax-exempt paperwork shall be available upon request of the selected contractor.

1.8 OBTAINING THE REQUEST FOR PROPOSAL

The Request for Proposal shall be available beginning on Monday, January 22, 2024.

A copy of the Request for Proposal and related documents may be obtained from the Town of Canton Planning Office. The project contact is TJ Torres, Town Planner, Town of Canton, 801 Washington Street, Canton, MA 02021, ttorres@town.canton.ma.us, 781-575-6575.

PART 2. INSTRUCTIONS TO PROPOSERS

2.1 REQUIREMENTS AND SUBMISSIONS

Below please find a description of the requirements and submissions that must be included as part of a proposal. Proposals must be sealed and marked as noted.

2.1.1 PRICE PROPOSAL FORM

Every proposal must include a completed 'Price Proposal Sheet' (see Exhibit B). **The price proposal shall be separately sealed and labeled as "Price Proposal".** All price proposals should cover all costs necessary to deliver the work described in the Scope of Services.

2.1.2 NON-PRICE/TECHNICAL PROPOSAL

Each proposal must include a Non-Price/Technical Proposal submittal, which shall be separately sealed and labeled as "Non-Price Proposal," containing:

NON-COLLUSION FORM (See Exhibit C)

Every proposal must include a certification of good faith, certifying that the proposal was made in good faith and without collusion or fraud. See 'Non-Collusion Form' attached.

TAX COMPLIANCE FORM (See Exhibit D)

Every proposal must include a written certification that the proposer has complied with all state laws relating to taxes, reporting of employees and contractors, and child support. See 'Tax Compliance Form' attached.

PLAN OF SERVICES

The Plan of Services should include, but is not limited to:

- Background of the firm(s)
- History, size and structure of the firm(s)
- Names of principals of firm(s)
- Listing of any actions taken by any regulatory agency or litigation involving the firm or its employees or agents with respect to any work performed or allegedly omitted.
- Qualifications
- Project team
- References
- Proposal Signature page (See Exhibit A)

2.2 PROPOSAL DELIVERY

Below please find a description of the manner in which sealed proposals must be submitted. Price and Non-Price Proposals must be separately sealed and labeled.

2.2.1 DUE DATE AND TIME

Proposals shall be received by the Finance Director's Office at 12:00 PM, Tuesday, February 20, 2024.

**Finance Director
Memorial Hall
801 Washington Street
Canton, MA 02021**

Any proposal received after that time shall be rejected as non-responsive. Proposals submitted via email or facsimile will not be accepted. See Section 5.4 for additional information regarding the project timeline.

2.2.2 ADDRESS

Sealed proposals shall be delivered to the Finance Director's Office located at 801 Washington Street, Canton, MA 02021.

2.2.3 HOURS OF OPERATION

Proposals must be delivered during the normal hours of operation of the Town of Canton's Finance Director: 8:00 AM – 5:00 PM Monday, Wednesday, and Thursday, 8:00 AM – 7:00 PM Tuesday, and 8:00 AM – 1:00 PM on Friday.

2.2.4 COPIES

Proposers must submit seven (7) copies of the non-price proposal and one (1) copy of the price proposal. Proposers must also include one (1) electronic copy (e.g. on USB flash drive) of the non-price proposal only.

2.2.5 LABELING

Price and Non-Price proposals must be separately sealed and labeled. Each proposal shall be labeled with (1) the proposal title, (2) the proposal due date, (3) the name of the proposer and (4) price or non-price proposal.

2.3 SIGNATURES

A proposal must be signed as follows: 1) if the proposer is an individual, by her/him personally; 2) if the proposer is a partnership, by the name of the partnership, followed by the signature of each general partner; and 3) if the proposer is a corporation, by the authorized officer.

2.4 QUESTIONS, CHANGES, MODIFICATIONS AND WITHDRAWALS

2.4.1 QUESTIONS/REQUESTS FOR CLARIFICATION

Questions concerning this Request for Proposal must be submitted to TJ Torres at ttorres@town.canton.ma.us by 10:00 AM on February 5, 2024. Written responses will be mailed to all proposers on record as having received the Request for Proposal by February 12, 2024.

2.4.2 CHANGES

If any changes are made to this Request for Proposal, addenda will be issued. Addenda will be e-mailed to all proposers on record as having obtained the Request for Proposal.

2.4.3 MODIFICATIONS AND WITHDRAWALS

A proposer may correct, modify, or withdraw a bid by written notice received by the Town of Canton prior to the time and date set for bid opening.

Modifications must be submitted in a sealed envelope clearly labeled "Modification No. __" to the address listed in part one of this section, consistent with original filing requirements. Each modification must be numbered in sequence and must reference the Request for Proposal.

After the proposal opening a proposer may not change any provision of the proposal in a manner prejudicial to the interests of the Town or fair competition. Minor informalities will be waived or the

proposer will be allowed to correct them. If a mistake and the intended proposal are clearly evident on the face of the proposal document, the mistake will be corrected to reflect the intended correct proposal, and the proposer will be notified in writing; the proposer may not withdraw the proposal. A proposer may withdraw a proposal if a mistake is clearly evident on the face of the proposal document, but the intended correct proposal is not similarly evident.

2.5 UNFORESEEN OFFICE CLOSURES

If, at the time of the scheduled proposal opening, the Finance Director's Office is closed due to uncontrolled events such as fire, snow, ice, wind, pandemic or building evacuation, the proposal opening will be postponed until the next normal business day and at the same scheduled time as the original deadline. Proposals will be accepted until that date and time. In the event of an extended closure, those who requested the RFP will be notified with next steps.

PART 3. EVALUATION & SELECTION

3.1 MINIMUM REQUIREMENTS

See below for further information regarding minimum requirements and qualifications of the vendor.

3.2 SCOPE OF SERVICE

See below for further information on the Scope of Service.

3.3 COMPARATIVE CRITERIA

See below for further information relative to the comparative criteria which will be utilized to rank the proposals.

3.4 RULE FOR AWARD

Per Chapter 30B Section 6 of the Massachusetts General Laws, any contract that may result from this procurement shall be awarded to the responsible and responsive proposer offering the most advantageous proposal, taking into consideration all evaluation criteria described herein, as well as price. The Town of Canton reserves the right to negotiate the price with the most advantageous proposer. If a price cannot be agreed upon, the Town of Canton reserves the right to enter into negotiations with the next most advantageous proposer.

3.5 SELECTION PROCESS

Following the deadline for receipt of proposals, the Finance Director will open the non-price proposals and prepare a register of proposals submitted. The non-price proposals will be evaluated by the selection group on behalf of the Select Board based on the Minimum Requirements and Comparative Criteria contained in this RFP. This selection group will be comprised of members from the CAP Steering Committee, Canton Finance Director, and Canton Town Planner. The selection group shall review the proposals and separately rank the proposals according to the evaluation process and

selection criteria. Once a first-choice candidate is identified through discussion of the ranked proposals, all price proposals shall be opened. The contract will be awarded to the proposal offering the most advantageous proposal, taking into consideration all evaluation criteria as well as price. The Town Planner shall contact the first-choice candidate.

PART 4. TERMS & CONDITIONS

4.1 TERM OF CONTRACT

The contract period for the term is anticipated to commence in Q2 2024 and end by no later than June 30th, 2025.

4.2 ASSIGNMENTS AND SUBCONTRACTING

The selected contractor(s) shall not assign, sell, subcontract or otherwise transfer any interest in this contract without the prior written consent of the Town.

4.3 PAYMENT

The Town shall make every effort to furnish payment within thirty (30) days of receipt of a reasonably detailed invoice, consistent with contract terms.

4.4 INSURANCE REQUIREMENTS

See Article 6 in the Town of Canton's Standard Contract for all information relative to insurance requirements.

4.5 INDEMNIFICATION

The Contractor shall indemnify, defend and save harmless the Town, its officers, agents and employees from and against any and all damages, liabilities, actions, suits, proceedings, claims, demands, losses, costs, expenses, recoveries and judgments of every nature and description (including reasonable attorneys' fees) brought or recovered against them that may arise in whole or in part out of or in connection with the work being performed or to be performed, or out of any act or omission by the Contractor, its employees, agents, subcontractors, material men, and anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, regardless of whether or not it is caused in part by any party indemnified hereunder. The Contractor further agrees to reimburse the Town for damage to its property caused by Contractor, its employees, agents, subcontractors or material men, and anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, including damages caused by his, its or their use of faulty, defective or unsuitable material or equipment, unless the damage is caused by the Town's gross negligence or willful misconduct. The existence of insurance shall in no way limit the scope of this indemnification.

4.6 FEDERAL AND STATE LAW

The selected contractor shall comply with all applicable Federal, State and Local laws and ordinances.

PART 5. SCOPE OF WORK

5.1 OVERVIEW AND PURPOSE

The CAP Steering Committee is requesting quotes from qualified individuals and firms for consulting services to assist the Committee in developing a Climate Action Plan for the Town consistent with Canton's FY 2024 Annual Town Meeting Warrant Article 27 as set forth below. This effort is funded through an EEA Planning Assistance Grant (ENV 24PLN 01) for Fiscal Years 2024-2025 for a total of \$50,000 plus a \$12,500 in-kind match by the Town of Canton.

5.2 BACKGROUND INFORMATION

Canton is a community located approximately 15 miles southwest of Boston, with a population estimated to be 24,609, according to Census 2022 figures². Its population has increased over 12% since 2010, which is a stronger rate of growth than projected in the Master Plan (2020)³. The town is an established and maturing suburb, characterized by lower densities throughout the community with a limited amount of vacant land that is developable⁴. Canton has a majority of single-family home developments (60%) on moderately-sized lots, with a relatively affluent population⁵. It is home to major employer and retail centers with connectivity to two commuter rail stations in the town center, access to highways I-95 and I-93, and Route 716 Massachusetts Bay Transportation Authority (MBTA) bus service⁶. The town of Canton is projected to continue to have more jobs than residents (1.04 job for every resident in 2017)⁷. Canton's DHCD Chapter 40B subsidized housing inventory percentage of overall housing units is 12.6%⁸. With a total of 13 census blocks, Canton has (7) seven Environmental Justice Census Block groups. Approximately 11,662 residents live within those seven blocks⁹.

The Town is governed by a five-member Select Board and Open Town Meeting. Daily management is by the Town Administrator appointed by the Select Board. Planning and development is controlled by Massachusetts General Laws (MGL), the Town Bylaws, and Canton Zoning Bylaw. The Canton Planning Board is an elected 5-member board, whereas the Zoning Board of Appeals is a 3-member board appointed by the Select Board. With few exceptions, the Zoning Board of Appeals is the special permit

² <https://www.census.gov/quickfacts/fact/table/cantontownnorfolkcountymassachusetts/PST040219>

³ <https://www.town.canton.ma.us/DocumentCenter/View/3884/Canton---People-Snapshot-PDF>

⁴ http://www.mapc.org/wp-content/uploads/2017/09/Massachusetts-Community-Types-Summary-July_2008.pdf

⁵ <https://www.town.canton.ma.us/DocumentCenter/View/3883/Canton---Housing-Snapshot-PDF>

⁶ <https://www.town.canton.ma.us/DocumentCenter/View/3878/Canton---Transportation-Snapshot-PDF>

⁷ <https://www.town.canton.ma.us/DocumentCenter/View/3879/Canton---Economic-Development-Snapshot-PDF>

⁸ <https://www.mass.gov/doc/subsidized-housing-inventory/download>

⁹ <https://s3.us-east-1.amazonaws.com/download.massgis.digital.mass.gov/shapefiles/census2020/EJ%202020%20updated%20municipal%20statistics%20Nov%202022.pdf>

granting as well as the site plan approval granting authority. The Building Commissioner also serves as the Zoning Enforcement Officer. The Planning Department is staffed by the Town Planner.

The Master Plan, Green Communities, Open Space and Recreation, MVP and Other Efforts

In April 2020, the Canton Planning Board voted to unanimously adopt the “[Canton Master Plan 2035: Community, Commerce, Conservation](#).” A Master Plan Implementation Committee has been formed, regularly meets, and supports climate-related goals consistent with [MGL, Title VII, Chapter 41, Section 81D](#). As an example, three of Canton’s Town Master Plan 2035 goals are: (1) to increase community sustainability through climate adaptation and mitigation efforts, (2) meet the public health and social wellbeing challenges of our most vulnerable community members, and (3) foster equitable economic prosperity and stability via collaboration with the business community.

As a Green Community, Canton has committed to a 20% reduction of GHG emissions in five years and while significant progress has been made, the CAP would support ongoing efforts to reach – and then exceed - these targets, operationalize climate and energy planning across municipal departments, and provide clear prioritization of key action steps with community input.

Canton also has several other approved plans, initiatives, and goals that address, either directly or indirectly, climate mitigation and adaptation, public health and social wellbeing, and economic development, including:

- [Open Space and Recreation Plan](#)
- [MVP Plan](#)
- [Energy Use Reduction Plan](#)
- [Land Use and Economic Development Efforts](#)
- [Greenhouse Gas Emissions Inventory](#)
- Multi-family Zoning Requirement for MBTA Communities Presentation to Select Board
- Washington Street Corridor Study
- Canton Center Rapid Recovery Plan
- Canton Junction Equitable Transit-Oriented Development Plan
- Complete Streets Prioritization Plan
- Canton Galvin Middle School Building Project

To date, these efforts have resulted in and/or presented opportunities to further Canton’s [sustainability-related goals](#), including promoting clean energy and increasing our resiliency. In addition, the Town has identified four other opportunities to reduce GHG emissions. The first involves upgrading Canton’s municipal building energy aggregation plan and related energy supplier contract. This will increase the amount of clean renewable energy content purchased by the Town. The second

opportunity involves Canton's municipal energy aggregation program. On December 29, 2023, the Town received approval from the MA Department of Public Utilities for its energy aggregation plan (i.e., [Canton Electricity Choice](#)). This plan aims to ensure a significantly increased amount of clean renewable energy in the Town's electricity supply being utilized by both Canton residents and businesses. The third opportunity involves updating the Canton Bylaw, Article XIII Stretch Code to the Opt-In Specialized Energy Code. The fourth opportunity lies in Canton evolving beyond the Green Communities program to become a MA Climate Leaders Community [CLC], enabling Canton to access valuable tools, resources to advance a voluntary framework to further reduce emissions by electrifying nonelectric energy uses and further maximizing building and transportation efficiency.

Further, there are numerous resiliency and climate action plans already in place across Massachusetts as well as industry best practices to model, including the Urban Sustainability Directors Network's [High Impact Practices \(HIPs\)](#) and the [Community Resilience Building](#) framework. By leveraging this previous work and best practices, Canton's CAP will both lower our planning-related costs and accelerate our ability to take impactful actions to advance equity, GHG reduction, and community resilience. See the [Beverley-Salem Climate Action and Resilience Plan](#), [Dedham Climate Action and Resiliency Plan](#), the [Belchertown Climate Resilience + Sustainable Growth Plan](#), the [Wayland Climate Action Mobilization Plan](#), and the [North Suffolk Zero Carbon Action Plan](#), among others, for additional details.

Collaboration and Cooperation

The Steering Committee seeks to collaborate and cooperate with other key stakeholders as part of its CAP development process. For example, the Committee has been engaged with various departments, including the Planning Department, Engineering Department, Department of Public Works, Building Department, Conservation Department, and the School Department. In addition, members of numerous boards and committees have been engaged, including the Select Board, Planning Board, Master Plan Implementation Committee, Sustainability Committee, Energy Advisory Committee, Board of Health, Board of Public Works, Conservation Commission, and Economic Development Committee. Further, the Committee is building relationships with non-government partners, including those serving the Environmental Justice (EJ) community, and our business community (e.g., the [Canton Association of Business & Industry](#)). Finally, the Steering Committee is seeking to leverage existing planning efforts, including Canton's respective Master, Open Space and Recreation, Land Use and Economic Development, and MVP plans and initiatives.

5.3 SCOPE OF SERVICES

Approach, Covered Areas, and Management Framework

The CAP Steering Committee seeks proposals from qualified individuals, firms, or organizations to assist the Committee in developing a high priority, high impact CAP consistent with evolving science, technology, economics, and public policy. This approach should include meaningful communication with and inclusion of our most highly vulnerable, impacted and Environmental Justice populations.¹⁰

Specifically, the Town of Canton is looking for an “executive style CAP” that focuses on quality over quantity. For example, the Town seeks a core set of high-priority, high impact initiatives that it can take over a reasonable timeframe¹¹ to equitably address both climate mitigation and adaptation-related benefits and burdens. This approach allows the Town to leverage existing efforts and best practices to address Canton’s most pressing and unmet climate challenges and opportunities in the most effective and efficient manner possible.

This approach requires the CAP to address initiatives that can be delivered at the local and regional levels across a variety of areas, including: (1) mobility and transportation, (2) built environment and development, (3) critical infrastructure, (4) solid waste, (5) public health and safety, (6) natural resources, (7) energy conservation and renewable energy/energy storage, and (8) communications and training.¹² For example, the CAP may identify initiatives requiring changes to general town bylaws, zoning bylaws, and/or building codes. It may also identify initiatives that address town-managed, household, business, and institutional assets and operations. Further, it may address initiatives that improve Canton’s resiliency and preparedness for extreme weather. In addition, the CAP may address regional solutions such as watershed-level flood control, public transportation, and the protection of critical infrastructure and habitat that crosses town borders.

The Town also seeks guidance from the consultant on the best way to manage a portfolio of CAP-related initiatives over time, this “management framework” should address the following questions and attributes:

- 1. Governance:** How should the CAP be governed, including the management of applicable legal and regulatory obligations, roles and responsibilities, reporting structures, required staff and funding sources, project / program objectives, etc.? For example, what governance model best addresses Canton’s complex, interdependent and dynamic challenges and opportunities in a more holistic manner (see [MAPC's Net Zero Playbook](#))?
- 2. Risk Management:** How should the highest climate risks / highest mitigation and adaptation impacts be identified, assessed and prioritized? For example, what user-friendly tools and techniques can help Canton best identify, assess, and prioritize responses to climate risks and

¹⁰ For additional detail, see the Commonwealth’s [Clean Energy and Climate Plan for 2050](#), Massachusetts’ [Sustainable Development Principles](#), and Canton’s other approved plans, initiatives, and goals described in Section 5.2, above.

¹¹ Canton anticipates that its high priority, high impact climate-related initiatives will likely fall into three planning horizons: (1) short-term (i.e., 1-3 years), (2) medium-term (i.e., 3-5 years), and (3) long-term (i.e., greater than 5 years).

¹² This list has been informed by a number of sources, including the [United Nations Sustainable Development Goals](#), the [MA Clean Energy and Climate Plan for 2050](#), [Canton’s 2035 Master Plan Action Plan](#), the [Beverley-Salem Climate Action and Resilience Plan](#), [Dedham Climate Action and Resiliency Plan](#), the [Belchertown Climate Resilience + Sustainable Growth Plan](#), among others.

decarbonization opportunities (e.g., see MEMA / EEA's [Massachusetts State Hazard Mitigation and Climate Adaptation Plan](#))?

3. **Communicate, Educate, and Train:** What communications channels (e.g., meetings, workshops, media outlets, etc.) should be used to inform stakeholders? What education resources would best foster meaningful, equitable engagement across multiple stakeholders (see [Resilient MA Climate Change Clearinghouse](#))? What training resources should be used to facilitate CAP implementation?
4. **Control:** What controls should be deployed to help ensure compliance with the CAP's desired outcomes? For example, should Canton include controls that help prevent, detect and correct potential non-compliance with applicable obligations? If yes, what types of controls would be best to use for which solutions?
5. **Monitor, Measure and Report:** What [SMART metrics](#)¹³ should be used to monitor, measure, and report against goals and progress over time? For example, what SMART metrics best capture both the baseline status of public and private mitigation and adaptation-related activities as well as demonstrate progress and measure impact over time (see [Beverly-Salem's Action Plan](#), [Dedham Climate Action and Resiliency Plan](#) and [Sustainable Concord](#))?
6. **Data Types, Tools and Techniques:** How Canton can collect data to correlate the impacts of climate change (flooding and heat) and environmental pollution (particulate matter from intermodal and surrounding highway traffic) on residents, including impacts on our most vulnerable populations? What data types should be collected using what data sources and systems to support Canton's monitoring, measuring, assessment, correlation and reporting needs? For example, are there municipal-focused tools and techniques that facilitate data collection and management across multiple data sources (see [Exec. Order 515](#))?

Project Tasks, Deliverables, and Measures of Success

This section outlines the six major project tasks, including deliverables and measures of success, which the consultant is expected to address as part of Canton's CAP:

1. **Evaluation and Selection Criteria** - The consultant will lead the effort to establish both quantitative and qualitative criteria to evaluate and prioritize high priority, high impact climate mitigation and adaptation initiatives. Success will be measured by how well these criteria facilitate Canton's climate solution-related decision-making process.
2. **Technical Memorandum & Matrix** - The consultant will conduct a review of existing Town plans, initiatives, and goals to identify a high priority / high impact list of potential climate mitigation and adaptation-related initiatives. Findings will be captured in a matrix and summarized in a technical memorandum. Success will be measured by how well the memorandum identifies opportunities and strategies to address Canton's most pressing and unmet climate challenges and opportunities in the most effective and efficient manner possible.
3. **Community Outreach, Communication and Meaningful Engagement** - The consultant will organize and host applicable working group meetings, focus group sessions, community engagement events, public meetings, direct mailing and town-wide calling efforts as well as

¹³ SMART stands for specific, measurable, achievable, relevant, and time bound.

establishing ongoing methods for public communication and engagement. This will include supporting a project website and social media content/postings along with print and digital media coverage. Success will be measured on the level of active participation by working group members, the quality of focus group sessions and community engagement events, the diversity of groups engaged in the planning process, and the broad and varied media coverage of the project.

4. **Develop Draft and Final Plans** - The consultant will develop both a draft and final CAP including a list of high priority, high impact initiatives. Each initiative will include SMART goals and objectives that effectively and efficiently address Canton's most critical climate challenges and opportunities. This portfolio of initiatives will identify applicable resources, funding opportunities, and a management framework to support their successful implementation. Success will be measured by how well the plans are endorsed by the Steering Committee, the public, and other town boards, commissions, and committees.
5. **Meetings & Project Management** - The consultant will manage applicable meetings with the Town Planner and Steering Committee, including scheduling, participation, agenda, and notes. The consultant will also provide quarterly status reports, reimbursement requests, and invoices. Success will be measured by the timely communications and coordination between the Town Planner, Steering Committee, and EEA staff.
6. **Final Report** - The consultant will complete a Final Report for this project. Success will be measured by the preparation and submission of this Report to the Steering Committee and EEA that documents the methods and outcomes of the project, including an electronic and paper copy of all deliverables.

Public Meetings and Community Outreach

The successful consultant will be expected to lead our CAP public engagement processes. Importantly, the Steering Committee seeks help expanding our outreach efforts, especially among our EJ communities¹⁴ and other underrepresented populations typically not engaged in local governance.

The planning process will include community outreach and input to inform the needs analysis and develop the overarching vision and goals. A core objective of the CAP is to build a public process that serves the dual purpose of engaging and informing the public of the Town's climate mitigation and adaptation needs, while building strong cross-sector support to implement solutions that serve all residents.

We expect the consultant to design a public engagement strategy that is creative and engages with a wide variety of stakeholders and hard to reach populations as much as possible to meet our goals to advance an equitable and inclusive process. We expect various information gathering and sharing events and methods to be designed by the consultant and Planning staff to effectively acquire and share information to support our CAP goals. Additionally, any outreach strategy cannot be an “off the shelf”

¹⁴ Canton's EJ communities include residents who are most vulnerable to climate and environmental hazards including particulate matter, flooding, and heat, and who are most burdened and least able to retrofit their homes.

strategy. The CAP and its associated outreach will be a springboard for many climate-related policies, plans, and outreach, including the efforts mentioned above; therefore, the strategy that is developed as part of this project needs to be flexible to provide an overarching framework to consider how the Town will move forward relative to meeting its climate mitigation and adaptation goals.

Town & Consultant Staff Roles

Town of Canton staff, primarily the Town Planner and Stormwater Manager, will be closely involved, but the Consultant is expected to devote the time needed to conduct research, write documents, and participate in regular meetings with the Steering Committee (or applicable subcommittees). Additionally, consultant staff will take primary responsibility for scheduling applicable project meetings, posting notices for meetings, preparing meeting minutes, and attending all project meetings. Town of Canton staff will provide any reasonably necessary baseline data, GIS data and layers, the existing Master, Open Space and Recreation, Land Use and Economic Development, and MVP plans as well as Zoning Bylaw and Map, the Town Bylaws, and other applicable town wide plans in progress or recently completed.

5.4 PROJECT TIMETABLE

With the support provided through this EEA Planning Grant, Canton anticipates completion of our Plan commensurate with the contract period ending June 30, 2025. The Consultant shall prepare a reasonable timeline to complete each task of this project outlined above in accordance with this end date.

The below project timetable is provided for planning purposes. Questions concerning this Request for Proposal must be submitted to TJ Torres at ttorres@town.canton.ma.us by 10:00 AM on February 5, 2024. Written responses will be mailed to all proposers on record as having received the Request for Proposal by February 12, 2024.

The deadline for proposals is 12:00 PM, Tuesday, February 20, 2024-- delivered to the Finance Director's Office located at 801 Washington Street, Canton, MA 02021-- at which time all proposals shall be acknowledged in the presence of witnesses, and a Register of Proposals shall be prepared. We are requesting seven copies of the project proposal, and one copy of the price proposal. These shall be submitted in separate marked envelopes, marked "Project Proposal" and "Price Proposal".

Request for Proposal issued	Mon, Jan 22, 2024
All questions due by	Mon, Feb 5, 2024, at 10:00 AM
Question responses provided	Mon, Feb 12, 2024
Proposal Due Date	Tues, Feb 20, 2024, at 12:00 PM
Anticipated Date of Award	Thurs, Apr 5, 2024
Anticipated Contract Start Date	Mon, May 6, 2024

Anticipated Contract End Date

Mon, June 30, 2025

5.6 COMPENSATION

The services will be performed for a lump sum fee that will be paid monthly based on negotiated deliverables.

6. MINIMUM APPLICANT QUALIFICATIONS

All applicants submitted proposals in response to this RFP must meet the following minimum qualifications. Failure to do so will result in the proposal's disqualification without further evaluation.

- 6.1 The applicant shall have had recent prior experience with work of a similar scope of services and shall list all current and past projects of a similar nature, including the name and telephone number of all similar clients during the past five (5) years.
- 6.3 The proposal shall list by name and function all in-house staff and outside consultants she/he intends to use on this project and shall include resumes and a list of their licenses and certifications where applicable.
- 6.4 The proposal shall include an expanded scope of services for all work required with time frames for work completion and with evidence of the applicant's capacity and ability to meet target dates.
- 6.5 The proposal shall identify the individual who will be the contact person with the Town and who will have primary responsibility for this project. This person shall remain in this position for the duration of the project (as long as she/he is employed by the chosen firm). This individual's resume shall also be included with the proposal. The Town reserves the right to interview and approve this individual.
- 6.6 The proposal shall include samples of previous work of a similar nature.
- 6.7 The proposal shall include the Certificate of Non-Collusion & Tax Attestation (Attached).
- 6.8 The proposal shall include a list of any individuals who have a financial interest in this agreement.
- 6.9 Signature on the Proposal Forms:
 - 6.9.1 If a proposal is submitted by an individual, the full name and post office address of the person shall be designated.

- 6.9.2 If a proposal is submitted by a firm or partnership, it shall be signed by a person having the legal authority to execute such a document on behalf of the firm or partnership.
- 6.9.3 if a proposal is submitted by a corporation, it shall state the name and title of the official or officials of the corporation by whom the contract can be legally signed.
- 6.10 The certification/license status of each person connected with the project shall be listed for each jurisdiction and each discipline.

7. SUBMISSION FORMAT

In order to more accurately assess submissions and to insure a more equitable review, the Town requests that all submissions adhere to the following format guidelines.

- 1) Table of contents
- 2) Relevant experience
- 3) All signature pages
- 4) Project understanding and project approach
- 5) Firm background
- 6) Firm organization and resumes
- 7) Consultants and resumes
- 8) Client references

8. APPLICANT REFERENCES

Applicants should provide firm name, address, phone and contact person for each reference.

- A. Customer references: Provide a minimum of five with similar projects in the past 5 years.
- B. Sub-Consultant references; Provide a minimum of three for each, if applicable.

9. EVALUATION CRITERIA FOR SELECTION

- 9.1 Each proposal shall be reviewed by an evaluation committee comprised of at least three members. Each of the following criteria will be evaluated by the committee and rated as follows: “Highly Advantageous”, “Advantageous”, “Non-Advantageous”, and “Unacceptable”:
 - 9.1.1 Completeness of the proposal
“Highly Advantageous” if the proposal is complete and thorough in every detail;
“Advantageous” if one (1) to two (2) clarifications are needed;
“Non-Advantageous” if between three (3) and five (5) clarifications are needed; and,
“Unacceptable” if more than five (5) clarifications are needed.

9.1.2 Overall quality of the proposal

“Highly Advantageous” if of outstanding quality;
“Advantageous” if of good quality;
“Non-Advantageous” if of fair quality; and,
“Unacceptable” if of less than fair quality.

9.1.3 Experience of consulting firm with similar site work as required for this project.

“Highly Advantageous” if five (5) or more than five (5) similar projects successfully completed within the last five (5) years;
“Advantageous” if between one (1) and four (4) similar projects successfully completed within the last five (5) years; and
“Non-Advantageous” if no similar projects successfully completed within the last five (5) years and/or the projects had problems.

9.1.4 Identify and set forth qualifications of the in-house staff and outside consultants (if needed) who will work on the project. Include the individual who will serve as the contact person and have primary responsibility for the project. The technical team shall not include office support or clerical staff.

“Highly Advantageous” if the project manager has more than ten (10) years of relevant work experience and technical qualifications;
“Advantageous” if the project manager has between five (5) and ten (10) years’ experience and technical qualification;
“Non-Advantageous” if the project manager has less than five (5) years’ experience and technical qualifications; and
“Unacceptable” if any member has no experience and technical qualifications.

9.1.5 Reference checks

“Highly Advantageous” if all references are unilaterally positive.
“Non-advantageous” if some references are less positive.
“Unacceptable” if some references are negative.

10. SELECTION PROCESS

10.1 Proposals will be evaluated upon the basis of the criteria for selection set forth in Section 3.5 above.

10.1.1 The Town reserves the right to request further information from the three highest ranked applicants.

MAPS, PLANS, AND ILLUSTRATIONS

All maps, plans, illustrations, and other documents produced shall be owned by the Town of Canton and may be reproduced as the Town sees fit. Mapping shall be produced in a file type compatible with the GIS, AutoCAD, and/or other design/engineering software it was produced in, as well as in .pdf format.

Required Proposal – Contract Forms

The following pages contain forms that must be included with the proposals.

- Exhibit A.....Proposal Signature Page
- Exhibit B.....Price Proposal Signature Page (separately marked and sealed)
- Exhibit C.....Certificate of Non-Collusion
- Exhibit D.....Certificate of Tax Compliance

EXHIBIT A: PROPOSAL SIGNATURE PAGE
CONTRACTOR, SCOPE OF WORK, TERM

1. Name of Contractor:
2. State of Organization:
3. Principal Office Address:
4. Description of Services (§2.1) (refer to bid documents, if appropriate):

5. Person, Department, or Committee, if any, to whom CONTRACTOR reports (§ 2.2):

6. Term of Agreement (§3.1), if other than through the completion of work:

7. Completion Date (§3.2)

8. Additional Insurance Coverage (§6.2(e)):

By my signature below, I acknowledge that all information within this response is true to the best of my knowledge:

SIGNATURE: _____ DATE: _____

EXHIBIT B
SAMPLE PRICE PROPOSAL SIGNATURE PAGE

Note: The price proposal shall be separately sealed and labeled as “Price Proposal”.

Price Proposal Sheet

Work Performed	Cost
	\$
	\$
	\$
	\$
	\$
	\$
Other (describe): (e.g. travel, administration)	\$
Total Cost	\$

Note: Should a discrepancy exist between the total cost proposed and the total of costs detailed by task, the detailed costs by task will be used.

NAME OF FIRM:

NAME:

TITLE:

ADDRESS:

Email:

By my signature below, I acknowledge that all information within this Response is true to the best of my knowledge:

SIGNATURE: _____ DATE: _____

EXHIBIT C

CERTIFICATION OF GOOD FAITH & NON-COLLUSION

The undersigned certifies under pains and penalties of perjury that this bid 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 of authorized individual submitting bid/proposal

Printed Name

Name of Business (if applicable)

Social Security or Federal Tax Identification Number

EXHIBIT D

TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. 62C, Sec.49A, the undersigned certifies under the penalties of perjury that it, to the best knowledge and belief of management, has filed all state tax returns and paid all state taxes required under law (if any, are so required).

By: _____

Date: _____

Federal EIN : _____