



Town of Ashland

Comprehensive Plan, Project Management Group

Meeting Minutes: February 6, 2023, at 6:00 PM

Location: Ashland Town Hall Meeting Room B & C / Hybrid Meeting with Zoom

Minutes Approved March 16, 2023

Present: Yolanda Greaves, Member
Michael Herbert, Town Manager
Catherine Jurczyk, Member
Brandi Kinsman, Member
Peter Matchak, Town Planner
Anna Tesmenitsky, Member

Others: Jennifer Ball, Assistant Town Manager

Michael Herbert called the meeting at 6pm- Group members present were Michael Herbert, Brandi Kinsman, Yolanda Greaves, Anna Tesmenitsky, Kate Jurczyk, and Peter Matchak. Also joining was Jennifer Ball, Assistant Town Manager

Michael passed out the revised version of the RFP. The first order of business was to review and discuss the draft RFP. The proposed process would be to go through the document tonight and finalize at our next meeting. The RFP would then be issued for 45 days. Once we receive responses, individual members of group will rank proposals based on the criteria. We will send to Jenn Ball as Chief Procurement Officer and rank by certain data.

Timeline discussion on RFP- Yolanda asked to potentially add a quarterly check-in. Anna said the timeline discussion was consistent with the timeline presented at Town Meeting. Kate asked for a clearer vision statement, need specific info.

The consultant may be less frequent attending the Steering Committee meetings during the data gathering phase. May be on a quarterly basis. Jenn said that we can add sentence in submission requirements regarding including staff commitment hours.

Under Scope of Work chart for Task 2- develop a vision statement. Brandi asked why this would come before the data gathering stage. The group discussed that the vision statement was aspirational and more like a mission statement, as was created for the Strategic Plan. Anna also voiced concerns about creating the vision statement at this point. We agreed that the vision statement could be revisited and tweaked if necessary throughout the process. Under outreach,



references to Covid-19 should be removed but we could include hybrid/remote options as potential options. Include the review of drafts in chart.

Task 3- baseline report. For housing, remove percentage of residents 5 years in their home. Add information on schools.

The rest of the RFP discussion will be tabled for now so we can get to other items on the agenda.

There have been a couple of follow-up questions from the letter that was sent to Board and Committees. The Council on Aging and School Committee asked if they could appoint 2 members (1 member and 1 alternate). Yolanda said that she was concerned about consistency and having someone less up-to-speed on the topic representing the board/committee. Anna, Kate, and Brandi agreed and said to allow 1 member from each board and committee. If they cannot commit for the full 2 years, the board/committee can replace them. The same will be for the precinct list (member from the same precinct).

The School Committee has a conflict with Thursdays as they now meet on the 3rd Thursday of each month. Michael will talk to Jim Adams and see if there is another option. This group will stick to Thursday meetings. We are also asking that people do not miss 2 meetings in a row and attend 80% of the meetings- aspirational but important. There will need to be an adjustment to the Steering Committee role doc.

Review of volunteer flyer that Brandi created. The group generally liked the flyer. Anna suggested a change in the language for minimum commitment. Peter to post a hard copy at the library and community center. Yolanda will talk to Josh Wiczer (advisor to AHS Student Council) next week at a StuCo meeting. Susan Robie will collect/track the talent bank forms for the precinct applicants and will send out the information to the team periodically. Anna can draft a rubric to evaluate.

Other items discussed in the RFP included whether to include cost in RFP- whether range of cost or not to exceed. Yolanda to send Michael language about public engagement plan. Any additional comments on components to be sent to Michael for next meeting which will be February 16th.

Motion to adjourn by Michael. Seconded by Yolanda. Voted 6-0 to adjourn at 8:11 PM.

Submitted by Brandi Kinsman

Document list:

- RFP draft



- Volunteer Flyer

Comprehensive Plan RFP

The Town of Ashland, Massachusetts is seeking a consultant to help update its comprehensive and strategic plan. Ashland has not had a completed comprehensive plan since 2003. Since then, the town has undergone tremendous changes and is looking for to developing a plan to chart a course for the next 15-20 years.

The comprehensive plan will be led by a Steering Committee of over 20 members, as well as a smaller Project Management team. The town is looking for an experienced consultant that brings a robust and creative approach to planning that can help the town develop a vision and goals that it can use to guide decisions in the future.

Timeline

The Comprehensive Plan Project Management Group has set aside 18-24 months for the entirety of the project. The overall timeline is expected to be as follows. The Project Management Team is open to alternative timeline proposals based on the consultant's experience and expertise.

Proposal Due	April 20, 2023
Consultant Selection	May 18, 2023
Contract Award/Start Date	June 1, 2023
Presentation of Vision Statement	Oct 1, 2023
Completion of All Components	October 1, 2024
Review of Draft Final Plan	December 31, 2024
Finalize Plan	March 1, 2025
Presentation at Town Meeting	May 7, 2025

Scope of Work

Task 1 - Outreach & Engagement Plan

The Town wants an innovative approach to engaging stakeholders, interest groups, residents, property owners, businesses, and others who live or work in Ashland. Ashland is not looking for outreach and engagement to be one phase; it should be integrated throughout the entire process. The Town expects that the consultant will help identify and engage groups and

individuals who may have been under-represented in past planning efforts. The public participation plan must also account for the continuing significance of COVID-19 and the potential need for adjustments in the plan as public health conditions evolve. The following provides some potential methods to gather input in developing the Plan.

Stakeholder Interviews

A crucial part of any successful planning process is having ongoing conversations with the Town's officials and community leaders. A list of stakeholders will be created in conjunction with the Project Management Group.

Outreach

Ashland's population has become more diverse in recent years. Its residents are a mix of ethnicities, renters, and homeowners, with families that have lived here for generations and people that have moved here recently. This presents challenges in assuring broad-based input into the Comprehensive Plan. The following is a partial list of some outreach that could be considered in the proposal:

- 1) Community-wide questionnaire/survey
- 2) Newspaper articles
- 3) Television (public access interviews, notices, updates)
- 5) Webpage (Q & A, plan process, meeting results)
- 6) Newsletters/emails
- 7) Social networks
- 9) Geographic based mapping and photo project for feedback/comments
- 11) Face-to-face meetings with community groups and in neighborhoods
- 12) Presentations at Planning and Select Board meetings

Task 2 - Develop Vision Statement

Working with the Steering Committee and Project Management Group, the consultant will evaluate and analyze the information gained through the public engagement process to identify and develop a structure and important components for a Community Vision that will serve as the basis of the Comprehensive Plan . Working with the Project Management Group and Steering Committee the, consultant will be expected to draft a Community Vision document. The vision document will include identification of a vision statement, goals, and priorities for the community as well as an explanation on how the Vision will serve as the basis of the comprehensive plan and other future planning projects. The vision statement should reflect the communities ideals for the town in the year 2040. The consultant will support the Project Management Team and Steering Committee in presenting a draft Vision Statement to the community and will distill this vision into a final document. The consultant is expected to provide graphic design services for the document. The Town is seeking a document with a design and structure that will be easily accessible to the Town's website and easily understood by the community.

The consultant's proposal should include how the Steering Committee, Project Management Group, and public will be updated and engaged in this task (i.e. meetings, correspondence, etc).

Task 3 - Existing Conditions & Community Profile: The consultant shall draft a Community Profile consisting of an inventory and analysis of existing conditions, including narrative, maps, and relevant data. The inventory will be used to assist in the identification of local issues and potential opportunities, and the consultant may use existing plans as a tool for information and context. The inventory and analysis of existing conditions (including existing zoning laws) should include the following, at a minimum:

- History of the Town of Ashland and its boundaries.
- Demographic characteristics (population and growth trends, age distribution, average household size, ethnic composition, average household income, social diversity and integration, demographic trends).
- Local and regional economic characteristics (unemployment rates and trends, work force characterization, dominant business sector type, major employers and industries, sales tax information, property tax rates, economic trends, and jobs range).
- Housing characteristics (the age, type, and condition of structures, type of occupancy - renters versus owners, vacancy rates and trends in the community and length of residency - percentage of residents five years in home, the extent and availability of low-income and workforce housing throughout the community and in identified neighborhoods, assessment of housing opportunities and choices, housing trends and access to jobs).
- Local and regional economies and development trends (including housing, commercial, industrial, and agricultural development). Particular attention must be given to sites on major thoroughfares, sites along environmentally sensitive areas, and business improvement district concepts.
- Land use and smart growth focus areas.
- Infrastructure and public utilities (i.e., drinking water supply, sewage disposal, solid waste disposal, stormwater management and green infrastructure, communications, gas, and electricity) extent, capacity, age, and maintenance.
- Transportation systems, local levels of greenhouse gas emissions, levels of mobility and circulation, walkable/bikeable neighborhood, connectivity with areas outside jurisdictional lines, distance to jobs.
- Natural resources and climate (air quality, watercourses, wetlands, floodplains, aquifers, forests/tree cover, steep slopes, soil types, and rare plant and animal habitats, precipitations, winds, temperatures, etc.).
- Extreme weather events, flooding, erosion hazards, and local resiliency.
- Health and emergency services and facilities.
- Parks and public spaces, recreation facilities, range of passive and active recreation, capacity and maintenance, accessibility etc.
- Other community facilities.
- Historic, cultural, and scenic resources.
- Water resources and public access.

- Zoning and other relevant local development controls, and the extent to which these are consistent throughout the Town.
- Fiscal resources.

The draft Community Profile shall be submitted to the Comprehensive Plan Steering Committee for review before being finalized. The consultant will incorporate feedback from the Steering Committee into a final draft.

At the end of this process, the consultant will provide a Community Profile report, including a comprehensive inventory and analysis in the form of relevant data, narrative, maps, and graphics.

The consultant's proposal should include how the Steering Committee, Project Management Group, and public will be updated and engaged on this task (i.e. meetings, correspondence, etc).

Task 4 - Development of Plan Components

The Consultant will be responsible for working with the Steering Committee and the Project Management team to address each of the following components of the comprehensive plan. Proposals should reflect how the consultant will accomplish getting input from the Steering Committee and public regarding each component. Proposals should also discuss how the consultant will approach the drafting process of the components as well as a timeline and presentation of drafts. As part of its proposal, the consultant should factor in two meetings with the Steering Committee for each of the stand-alone components of the plan identified below.

Stand-Alone Components

a) Land Use This component of the Comprehensive Plan will define optimum sustainable development patterns, density, and other standards for each land use classification and location in Ashland. The Land Use section should specify priority development and conservation areas consistent with the Open Space and Recreation Plan and other input and include an existing land use map, relevant population, housing, and growth projections, with build-out analyses for both residential and commercial uses. This will include an evaluation of land use tools such as low impact development standards, current zoning, Design Review guidelines, MGL 61A and 61B, Transfer of Development Rights, sustainable development principles, current statutory rules, and Adaptive Reuse.

Tasks and Deliverables include:

- Prepare a build-out analysis presenting current development, demographic, and socioeconomic trends to the year 2040. An initial build out analysis should assume all existing regulations and bylaws around zoning and land use remain the same, with no town intervention. A second build-out should incorporate any proposed Zoning Bylaw to be created or modified resulting from the implementation of the recommended changes to the Zoning Bylaw and/or Zoning Map.

- Assist the town in developing present and future land maps.
- Assist the town in quantifying the current area per land use and area per zoning district, as well as the area that remains developable in each zoning district.
- Analysis of zoning districts and land use change to be made.

b) Housing This component shall identify current and future housing needs in Town, based on economic and demographic trends, and shall identify programs and policies by which Ashland can meet those needs in a sustainable manner. This component will be consistent with Ashland's Housing Production Plan. Identified housing goals include: promote a wider range of housing types in Ashland that remain harmonious with the Town's character; create housing options that increase the retention of young families and senior citizens; introduce or modify zoning bylaws to encourage quality development patterns that maximize resource protection while optimizing the use of space; implement housing strategies outlined in Ashland's Housing Production Plan to create affordability and housing diversity; inform and educate residents on Ashland's housing challenges and promote strategic community engagement.

Tasks & Deliverables include but are not limited to:

- Conduct a detailed population projection analysis to the year 2040;
- Compile a comprehensive, detailed description of policies to encourage the development of housing to meet current and projected needs. This may include infill development, traditional neighborhood development, inclusionary zoning, density bonuses and mixed-use and rental development;
- Compile a detailed description of programs to assist residents in attaining affordable housing;
- Identification of locations appropriate for housing development of various densities and types, with appropriate deference to market realities, public opinion and Ashland character;
- Consideration of strategies to aid the Town in achieving and maintaining certification under MGL Chapter 40B;
- Ensuring consistent strategies that link Ashland housing initiatives with other community goals, including sustainability, land conservation, economic development, and historic preservation.

c) Economic Development This component assesses the current status of economic activity in Ashland and efforts to further develop these activities consistent with economic realities, residents' needs and the character of the town. The consultant shall guide the Town in considering appropriate ways government can support and build upon existing commercial enterprises and market trends while supporting sustainable strategies to improve Ashland business climate and attract additional business and residential investment. The consultant should provide recommendations of how to right-size the existing commercial districts; whether districts need consolidation or if the Town could and should support multiple economic centers.

Tasks & Deliverables include but are not limited to:

- Create an inventory of industrially and commercially zoned land

- Complete a comprehensive analysis of existing conditions, including vacant and underutilized parcels, and projections of likely future conditions. This should include an analysis of existing strengths, opportunities and weaknesses in order to recommend sustainable strategies;
- Compile economic projections based on projected population/ demographics and market realities
- Assessment of the capacity of the Town to either host additional commercial locations or increase density of existing commercial areas and the likelihood of the market responding to that expansion
- Identify programs or policies for expanding Ashland's economic base with sustainability in mind.

d) Cultural & Historic Resources This component of the plan is intended to identify, assess and make recommendations on current and future cultural resource needs, and to identify and assess historical resources, and make recommendations on protecting, preserving, and promoting them in the future as the Town changes.

Tasks & Deliverables include but are not limited to:

- Inventory existing natural, cultural, and historic resources in the town;
- Recommend strategies for preserving and enhancing these resources;
- Analyze impact of any recommended land use and/or zoning changes on natural, cultural, and historic resources;
- Recommend strategies for efficient and effective cultural and historic resource management, including volunteer committees or non-profits;
- Analyze impact of any recommended changes to natural, cultural, and historic resources on population health.

e) Municipal Facilities, Assets & Services This component includes an inventory of existing public facilities, assets and services. Additionally, as consultant should identify what resources are necessary to achieve the goals and vision established by the comprehensive plan.

Tasks & Deliverables include but are not limited toTasks include:

- Analyses of each facility and service, specifically noting any deficiencies that may exist currently or in the future;
- Determine the adequacy of schools for which Ashland is responsible based on population and population demographics projections and anticipated curriculum requirements;
- Given the results of the evaluation and projections above, determine whether the existing facilities are adequate, need significant improvements, additions or new facilities;
- Determine whether there is sufficient Town property to accommodate additions or new facilities, assuming analysis and projections suggest they are required;
- Recommendations to address each deficiency in a sustainable manner;
- Analyze and assess how proposed policies may impact projected school enrollment and staff requirements;

- Project the extent of Town facilities and assets required to accommodate the needs of the Town using population demographics and input from Town government, Ashland schools and residents;
- Investigate the extent and types of facilities in similar towns to benchmark Ashland facilities and help project needs.
- Identify the staffing and operational resources necessary to support all components of the plan.

f) Open Space & Recreation This component of the Comprehensive Plan will address how to support open space and recreation to meet the needs of the community. The Comprehensive Plan must be consistent with the current Open Space & Recreation Plan, understanding that the town has made significant progress recently in the acquisition and protection of open space. The consultant shall help guide the Town in weighing trade-offs between various land uses and competing demands within the Comprehensive planning context. Priority parcels will be identified for future protection and current and projected population demographics will be examined to determine the current adequacy and future needs for open space and recreation including additional passive recreation (hiking, biking, etc.) and playing fields for organized sports. The current and projected need will be benchmarked to corresponding open space and recreational facilities in larger towns in the vicinity.

Tasks & Deliverables include but are not limited to:

- Inventory of recreational resources;
- Identification of policies and programs to enhance and promote recreational resources;
- Review existing open space in Ashland and assess usage by residents;
- Identify future open space opportunities from major land parcels;
- Identify new locations for organized sports fields based on population growth and need by sport.

g) Transportation and Mobility This component of the Comprehensive Plan will analyze the Town's current and proposed transportation system, focusing on major streets and roads, pedestrian circulation, bicycle paths, and parking.

Tasks & Deliverables include but are not limited to:

- Analyze baseline data with projections through 2040 detailing journey-to-work data, commuter data, car ownership data, walk-to-school data, and other relevant statistics;
- Review data and public input from the Complete Streets Prioritization Plan process;
- Identification and assessment of circulation system problems and requirements;
- Assess the current status of sidewalks, pedestrian and cyclist connectivity, and ADA access;
- Provide recommendations for strategies to improve multi-modal mobility within Town and to key regional destinations;
- Considerations of locations for future multi-use paths, primarily Ashland's Upper Charles Trail;
- Provide recommendations of how to reduce automobile use and increase regional connectivity, such as review of first mile/ last mile programs.

Themes

In addition to each of the stand-alone components, the Project Management Team has identified three subject-area themes that need to be interwoven through each component of the comprehensive plan. These themes include:

a) Public Health and Wellbeing As opposed to an isolated section, Health and Wellbeing should be interwoven through each of the plan components. A suggested model for the consultant to use is SAMHSA's Eight Dimensions of Wellness.

b) Diversity, Equity and Inclusion - Diversity, Equity and Inclusion. The consultant should address how components of the plan reflect the input and needs of ALL Ashland residents, and how all residents will be impacted by any proposed policies.

c) Climate Change & Action: Ashland's Comprehensive Plan will use Climate Change & Action as a guiding principle and practice throughout each of the plan's component. The consultant will need to synthesize data found in the Open Space and Recreation Plan, Hazard Mitigation Plan, and Net Zero Framework and other relevant documents that the Town has recently produced.

Task 5 - Implementation Plan

Task 6 - Drafting of Full Comprehensive Plan and Presentation of Final Plan

Once the components of the plan are completed, the consultant will be expected to prepare a full draft of the comprehensive plan with guidance and direction from the Steering Committee and Project Management Team. After the draft is completed, further input will be provided by the full Planning Board and Select Board. The consultant will be asked to incorporate feedback into a final draft that should be completed by March 1, 2025 and presented to the Steering Committee as well as the full Planning and Select Board.

For this task, it is anticipated the consultant will need to meet with the Steering Committee three times and meeting and two times with the full Planning/Select Board.

Submission Requirements & Minimum Criteria

A written response must be provided for all requirements of this RFP in the order of the items listed. The respondent should include 7 copies of proposal along with an electronic copy on a USB drive. Each proposal shall be prepared simply and economically, providing a straightforward, concise delineation of the Proposer's capabilities to satisfy the requirements of the RFP. The response must include:

1. A Cover Letter signed by a representative who is authorized to contractually bind the Proposer.
2. References & Past Engagements: A list of at least three references familiar with one of the respondent's similar projects listed and the respondent's role in the project (e.g., public officials in the project's community, professional planners, architects, engineers, etc.) including their names, addresses, telephone numbers and involvement (if any) in the project. In addition, city/town names and contact information should be provided for the last three plans that the consultant was engaged to complete.
3. A Narrative Description of Similar Project Experience and Sample Plans: Provide a detailed narrative of the respondent's experience with the completion of comprehensive plans for similar communities, including those in Massachusetts. This narrative should describe similar projects and the respondent's role in the projects and the number of years in which the respondent has operated in the field of community Comprehensive planning.
4. Project Approach: A overall description of the strategy to be used by the consultant to gather information and feedback, work with committees and focus groups, submit products, and meet the project schedule.
5. Task Approach: A description of how the consultant will approach each task listed in the scope of work.
6. Project Team: A description of the entity submitting the proposal. Must include the names of responsible parties to receive notices to include corporate name(s) and DBA(s) if applicable; address and telephone number(s), names, addresses, and titles of principals with the authority to enter into a contract. Qualifications and experience of the Planning Team, including any potential subcontractors. Only include qualifications for those team members who will be assigned to the project.
7. A Writing Sample (not to exceed 10 pages) prepared solely by the respondent within the last five years which demonstrates the respondent's ability to formulate planning recommendations. Additionally, please provide digital forms of up to two Comprehensive Plans, Zoning bylaws, or similar planning documents prepared by your firm/team, preferably for similarly-sized communities.
8. Information about the respondent's experience and approach to community involvement. If possible, please include at least one example of working with marginalized/historically disconnected or underserved populations.
9. A proposed timetable for the completion of services that meets the schedule required in this request.
10. A price proposal. There is no specified format for the price proposal, but fees shall be delineated for each of the proposed project activities. The price proposal shall be submitted in a separately marked envelope.
11. Signed addenda, if any were issued to change the original RFP as a result of questions or other reason.
12. Required forms or information:
 - a. An Affidavit of Non-Collusion and State Tax Status.
 - b. A disclosure statement, giving the names and addresses of all partners, officers, directors, and owners with an ownership interest in the respondent firm.

Evaluation Criteria

The Project Management Team and CPO will rank each proposal utilizing the following criteria:

1. Understanding of the Project

The Project Management Team and CPO will review responses for their understanding of Ashland, the unique needs and priorities of the town, and the identification of any concerns about meeting the proposed timeline with the proposed budget.

Highly Advantageous - The consultant demonstrates a superior understanding of the town and its needs and priorities, and can meet the proposed timeline

Advantageous - The consultant demonstrates an adequate understanding of the town and its needs and priorities, and can meet the proposed timeline

Unacceptable - The consultant does not demonstrate an understanding of the town and its needs and priorities, or cannot meet the proposed timeline and budget

2. Project Approach

This includes both project management and technical approach. The Project Management Team is looking for a proposed work plan that is attainable, within the town's timeline, bold and creative, and addresses all of the plans tasks. A clear description of how the consultants will approach and attain the various aspects of this multifaceted project is key.

Highly Advantageous - The consultant's proposal addresses all the criteria listed above

Advantageous - The consultant's proposal addresses several of the criteria listed

Unacceptable - The consultant's proposal does not provide an adequate approach to the overall project and/or does not demonstrate an adequate approach to each task.

3. Qualifications and Experience

The selection committee will review responses for a demonstrable record of success in completing similar projects, professional experience of key members, and references from previously completed projects of a similar nature. Firms may need to form a team in order to be qualified to address the wide ranging issue topics as well as demonstrate the specific skills needed to meet the scope of work (for example - diversity and inclusion specialists, and public participation specialists).

Highly Advantageous - The consultant has satisfactorily completed more than 5 comprehensive plans for municipalities and clearly demonstrates the ability to form a team that has the skills needed to meet the scope of work.

Advantageous - The consultant has satisfactorily completed 3-5 comprehensive plans for municipalities and clearly demonstrates the ability to form a team that has the skills needed to meet the scope of work.

Unacceptable - The consultant has not satisfactorily completed at least 3 comprehensive plans for municipalities and/or does not clearly demonstrate the ability to form a team that has the skills needed to meet the scope of work.

4. Public Engagement Plan

The engagement plan will be evaluated for creativity, frequency and type of activities, the target audiences served, and functionality/relevance in Ashland.

Highly Advantageous - The consultant's engagement plan is creative and multifaceted. The consultant has demonstrated a superior ability to reach groups that are historically underrepresented.

Advantageous - The consultant's engagement plan is creative and multifaceted. The consultant has demonstrated an adequate ability to reach groups that are historically underrepresented.

Unacceptable - the consultant's engagement plan is not creative and multifaceted, or does not demonstrate an adequate ability to reach groups that are historically underrepresented

If the consultant or part of their team is a certified WMBE, they will be considered highly advantageous.

Rule Of Award

Up to three top ranked proposals will be invited for an interview with the Select Board and Planning Board. After interviews, both Boards will select the proposal that is in the best interest of the town by majority vote.

Volunteers Needed!



Join us in planning for Ashland's future!

The Comprehensive Plan team is looking for Ashland residents to volunteer their time on our Steering Committee to develop a town-wide Master Plan for the next 10-20 years.

- Seeking a broad representation of the community from all voting precincts
- Steering Committee members will be a part of the 18-24 month process
- Minimum commitment: meetings will be one Thursday evening a month, beginning on May 18, plus other involvement from time to time
- Apply by March 1st



Scan this code to apply by completing a Talent Bank Form!

More information can be found about the Comprehensive Plan process and Steering Committee at ashlandmass.com

Contact the Comprehensive Plan Project Management Team at complanpmg@ashlandmass.com with any questions.

