

# **Town of Harvard, MA**

## **Request for Proposal (RFP) for District Scale Real Estate Market Analysis and Fiscal Impact Analysis**



**Issue Date: August 30, 2021**

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## Section 1 – Introduction and Instructions

### Purpose of the RFP

This Request for Proposals (RFP) is issued by the Town of Harvard, Massachusetts Community and Economic Development Office in affiliation with the Planning Board. The purpose of this RFP is to establish a contract with a qualified consultant to perform an independent real estate market analysis for the town's Commercial District and to conduct a fiscal impact analysis based on the market analysis findings. The outputs of these analyses will be used to help the Town establish a vision to reconfigure the Commercial District, which is the subject of subsequent phases sought by the Planning Board.

### Contact Information

Ms. Marie Sobalvarro, Assistant Town Administrator and Chief Procurement Officer is the primary point of contact for this RFP:

13 Ayer Road  
Harvard, MA 01451  
978-456-4100 x.330  
[msobalvarro@harvard.ma.us](mailto:msobalvarro@harvard.ma.us)

Additional contacts during the project phase will be:

Mr. Christopher J. Ryan AICP; Community and Economic Development Director  
[cryan@harvard.ma.us](mailto:cryan@harvard.ma.us)

### Proposal Schedule

This schedule represents the Town of Harvard's best estimate of the timing for the RFP process. If a component of this schedule such as the deadline for receipt of proposals is delayed, the rest of the schedule may be shifted accordingly.

- RFP Issued: August 30, 2021
- Proposals Due: October 1, 2021
- RFP review begins: October 4, 2021
- Interviews with consultants: mid- to late-October 2021
- Intent to award: November 2, 2021
- Work begins: November-December 2021

Note: execution of project may be contingent on securing additional funding, depending on the proposed costs received during the RFP process.

### **Return Mailing Address and Deadline for Receipt of Proposals**

Respondents must submit one (1) electronic copy (PDF required) and five (5) hard copies of the proposal in a sealed envelope or package. Envelopes or packages containing proposals must be clearly addressed as follows:

Town of Harvard, MA  
Attn: Marie Sobalvarro  
Re: Market Analysis and Fiscal Impact Analysis RFP  
13 Ayer Road  
Harvard, MA 01451

Proposals must be received by the Town no later than 2:00 p.m. on Monday, October 4, 2021.

Each Respondent's Proposal shall include a Fee Proposal in a separate sealed envelope.

Respondents assume the risk of the method of dispatch chosen. The Town of Harvard assumes no responsibility for delays caused by any delivery service. Postmarking by the due date will not substitute for actual proposal receipt. Late proposals or amendments will not be considered.

### **Questions**

Questions regarding this RFP are welcomed and encouraged if Respondent seeks clarity on any part of the RFP. Please direct all questions to Christopher J. Ryan at the contact information above. Harvard will make an effort to post any broadly applicable questions and answers on the [project website](#)<sup>1</sup> in a timely manner. Any errors in the RFP will be posted on the project website. Questions may be submitted up to Thursday, September 23, 2021 at 3:00 pm.

Firms that may be interested in submitting a response are strongly encouraged to submit their contact information upon receipt of the RFP to be sure they receive relevant updates, if any, to the RFP.

## **Section 2 – Scope of Work**

### **Introduction and Background**

Harvard, Massachusetts is a small exurban community located just outside of I-495 west of Boston. With a population of 6,620 (U.S. Census estimate for 2019), over 94% of Harvard tax revenue derives from residences, and nearly 82% of zoned land is for residential with commercial zoning making up only 2.4%.

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<sup>1</sup> <https://www.harvard-ma.gov/economic-development/pages/ayer-road-planning-framework-project>

Harvard's Commercial Zoning District, located along Ayer Road (State Routes 110/111) has not developed as anticipated, as noted in the past four master plans completed by the Town (1970, 1988, 2002, and 2016). Currently, the District is not served by either municipal water or sewer service. The base Floor Area Ratio (FAR) is 0.10 with a special permit overlay allowing 0.20 if affordable housing is included.

The aforementioned master plans have each recommended a more village-like development pattern that would be complementary with the rural, historic, New England pattern of development that the rest of Harvard exhibits. However, without the necessary infrastructure and a zoning that would facilitate this pattern, the District has slowly evolved into a very low density example of suburban commercial sprawl with no design theme, no land use cohesiveness, and no character.

Moreover, Harvard has identified in the 2016 Master Plan and other policy documents, a lack of available housing in certain sectors as a limitation to certain types of commercial development. From affordable, low- and moderate-income housing to workforce housing, starter homes, empty nester housing, and housing for the various cohorts of seniors, there is a lack of housing stock in general. A housing needs assessment is crucial if Harvard is to actively move forward with targeted residential development and growth as part of an overall economic development strategy.

With all of this in mind, the Harvard Planning Board adopted a Three Phase Plan for the area in 2019, the details articulated in [this policy document<sup>2</sup>](#), which advocates for a reconfiguration of the commercial zone, irrespective of the current parcel configuration, to advance the pattern of development described above.

The program recommends that Phase 1 will be a market analysis and fiscal impact analysis projecting viability and return on investment for various scales and scenarios of development for a desired reconfiguration of the current commercial district.

Phase 2 will be a corridor vision plan to gain citizen input, develop design schemes and renderings, and address systemic issues such as infrastructure, open space, amenities, transportation, and land use regulations. Finally, with a vision developed by citizens, the Planning Board will need to develop a regulatory framework (Phase 3) that supports this vision and one option for this garnering interest is a Form Based Code (FBC).

Related to existing and market potential within Harvard's municipal boundaries, adjacent communities such as Ayer, Littleton, Shirley, Bolton, Boxborough, Stow, and Lancaster are all experiencing residential development, all of which can both provide additional marketable opportunity for Harvard, but also impact Harvard infrastructure such as roadways.

Harvard believes that taking a comprehensive approach with a district-wide market and fiscal analysis project for the corridor would not only result in a better and more actionable end product but would also more accurately take into account the dynamics of how the various land uses are interrelated.

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<sup>2</sup> [https://www.harvard.ma.us/sites/g/files/vyhlf676/f/uploads/ayer\\_road\\_planning\\_2019\\_draft\\_8.2\\_2.pdf](https://www.harvard.ma.us/sites/g/files/vyhlf676/f/uploads/ayer_road_planning_2019_draft_8.2_2.pdf)

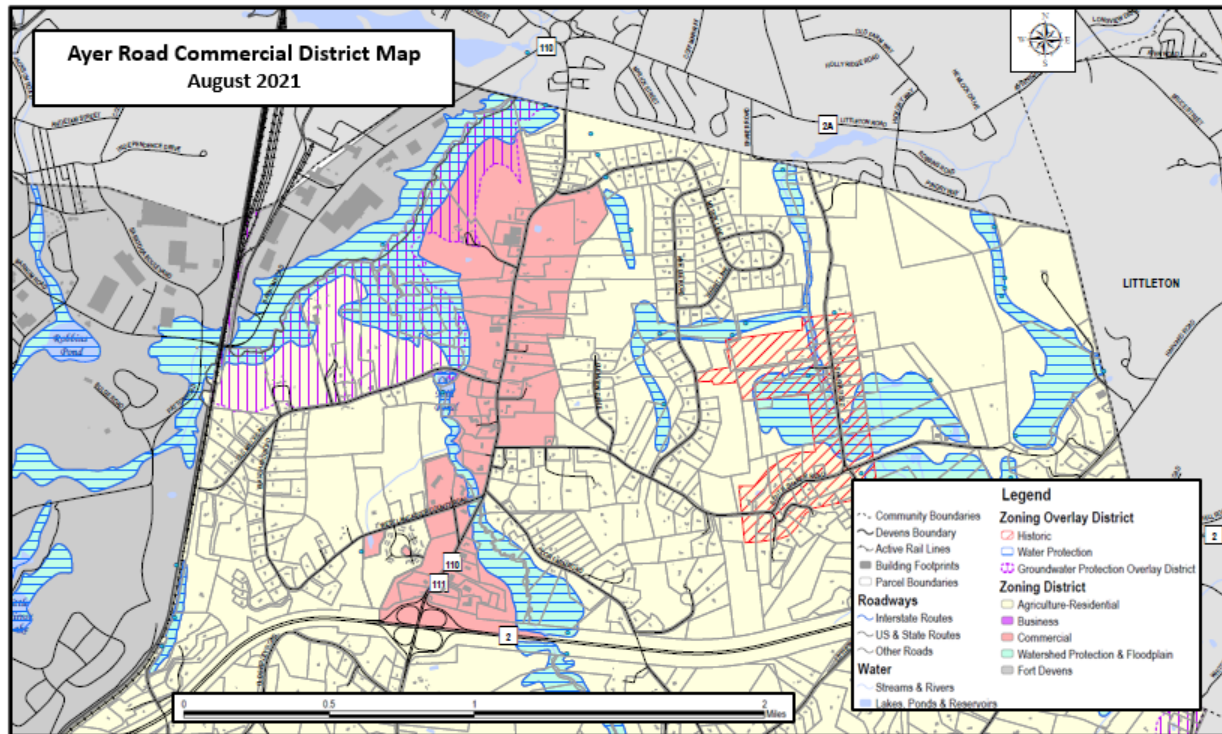


Figure 1 - Ayer Road Commercial Zoning District (Pink)

The completion of a comprehensive market analysis is imperative. To build a foundation for successful commercial corridor development, this market study will identify the current and future business and cluster mix of the commercial corridor: Commercial (primarily retail and dining), Services, Office, R&D/Lab, Residential, and other uses that may be a good fit for the community and area. This data will inform the next phase of the project—a Corridor Vision Plan, and set the stage for an innovative zoning solution for the area.

Past efforts to develop the Ayer Road corridor have met with resistance from residents concerned about a negative visual impact on the community or self-serving developers. The 3-Phase Ayer Road Commercial District Vision Plan Framework addresses this concern and other potential apprehensions by providing citizens with a platform to help develop a unified development plan for the corridor. These concerns are why a carefully crafted three-phase project has been created and why the first phase is so critical to the successive phases. In order to justify further time and effort, the analysis must show growth potential that is fiscally positive, so that the Town can balance its tax base and relieve the burden on residences to fund town services and facilities.

### Site Dimensions

The project area measures approximately 344.5 acres along a +/- 1.2 mile stretch of Ayer Road (Route 110/111) extending from the Route 2 interchange to 1/3 mile south of the Ayer Rotary. See map on the previous page (Figure 1) for a recent zoning depiction of the study area (the lands zoned Commercial or C in pink).

## **Project Objectives**

A project working group will be formed by the Planning Board to review proposals, conduct interviews, select the consultant for the project, and guide the project's process. Economic Development staff will serve as the primary local point of contact for the project. A summary of project objectives follows, and details related to objectives are provided below.

### *Market Analysis*

1. To have the specific trade areas delineated
2. To have a SWOT<sup>3</sup> analysis performed for the district
3. To have a market and trade area analysis conducted
4. To have the consultant identify an optimal mix of uses and tenant types
5. To have a development strategy created

### *Fiscal Impact Analysis*

1. To have the consultant recommend a specific fiscal impact method with justifications for the choice
2. Have the development of a set of findings created in a form that provides clear answers related to the fiscal impact of each scenario. Findings shall not only be developed for each scenario but shall also show the impact of various revenue generation scenarios by changing tax rates and also considering other revenue tools such as TIFs<sup>4</sup> and special option taxes.
3. The consultant shall provide a set of recommendations to the Town on the most revenue beneficial strategy to pursue.

### *Market Analysis Detailed Project Objectives*

The intent of the market analysis and strategy is to achieve the following objectives for Harvard:

1. Delineate Harvard's trade area for a range of uses.
2. Learn the strengths, weaknesses, opportunities, and threats of the Ayer Road commercial district.
3. Have a market and trade area analysis conducted for a range of potential uses depicted in the scope.
4. Receive a sales gap analysis and competitive supply analysis to determine the leakage being experienced and what Harvard's direct competition is.

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<sup>3</sup> Strategic planning term referring to (S) Strengths, (W) Weaknesses, (O) Opportunities, and (T) Threats.

<sup>4</sup> TIF = Tax Increment Financing (an economic development incentive for developers and businesses).

5. Receive a forecast of the district's capture potential, by use, and what this translates into related to specific square footages and residential units.

### *Fiscal Impact Analysis Detailed Project Objectives*

Harvard seeks to have a fiscal impact analysis of the results of the market analysis conducted in order to show the anticipated revenues generated by each scenario; the anticipated additional costs for services, personnel, and facilities created by the new development; and the net return to the Town for each.

The specific method of fiscal impact analysis to be conducted (average costing, marginal costing, or hybrid) should be justified by the consultant based on understanding Harvard's desired outcomes which include whether municipal operations need to be enhanced to meet the needs of the new development and by how much. Additionally, the consultant should take into consideration the [critiques of traditional methods](#) on the specific conditions of the Town and project area as well as specific needs articulated for this project including residential impacts from commercial projects, interaction of land uses, and compact versus sprawl development.

Given these considerations, Harvard seeks a fiscal impact analysis product that best fits the situation of the region and community, development scenarios established in the market analysis phase, and the specific data needed to make a decision about proceeding with the subsequent phases of the project. Thus, we are looking for a proposal that:

1. **Selects an Appropriate Method** – Recommends a specific fiscal impact method and provides a justification for the method based on the specific circumstances of this project in the context of Harvard.
2. **Determines Fiscal Impact** – Provides a set of findings that establish clear fiscal impact data on each of the scenarios developed as part of the market analysis.
3. **Clearly Communicates Recommendations** – Provides recommendations for each scenario related to how Harvard must respond to the provision of public services at each development level. For example, for a specific scenario, Harvard may need to provide three additional police officers and two squad cars. The recommendations should be in a report accompanied by a spreadsheet or other tool showing the data for each scenario. This tool should be created to allow Harvard to make adjustments to show how changes may affect impacts.

### **Scope of Work**

**Note:** The following Scope of Services and associated deliverables are, based on the Town's objectives, the best estimate of what data and analysis will be needed to answer the key questions before making a "go/no-go" decision regarding Phase 2 of the Ayer Road Corridor Vision Plan Project. Harvard encourages prospective respondents to restructure and tighten up the Scope based on your experience and your understanding of the budget limitations of this project.

## *Market Analysis*

The selected consultant will provide research, analysis, and recommendations sufficient to accomplish the “Project Objectives” as stated above. At a minimum, the scope of work shall include the following tasks:

**Administrative Tasks:** The following scope tasks are related to meetings, communications, and other administrative tasks as part of the project:

1. Virtual kickoff meeting to review project goals, objectives, relevant materials, finalize details of the scope, and develop project schedule with Town Staff and Work Group.
2. Four (4) updates to Staff/Work Group.
3. Weekly progress report emails with Town Staff and at least three (3) check-ins with Town Staff regarding progress.
4. Optional: Presentation of findings to a joint meeting of the Planning Board and Select Board.

**Task 1:** Assess Current Local and Regional Market – Develop an overview of the community and its demographics, regional economy, and local economy and market (market delineation) to provide a context for this analysis and strategy. Identification of local and regional trade areas for each use related to the commercial district is crucial for this step. This should include:

- a. **Summarize Harvard Existing Conditions in the District** – Assembly and review of existing businesses and housing inventory addressing retail, dining, entertainment, personal and professional services, research and development, and offices, as well as all types of housing. Other characteristics such as transportation system, infrastructure, and environmental constraints should be identified. The inventory will be based upon readily available existing data, and the consultant will fill voids and update data as needed. Develop a written narrative of existing market conditions to address relevant issues such as the quantified number of various businesses and housing types, vacancy space/units, product mix and pricing, and similar characteristics.
- b. **Delineate Trade Area** – Develop trade area demographics and lifestyle characteristics, with particular attention to characteristics of interest to potential Harvard development sectors.
- c. **Sales Gap Analysis** and **Competitive Supply Analysis** – Developed for Harvard versus surrounding communities and those within the trade areas.



- d. **SWOT Analysis** – Using a SWOT<sup>5</sup> analysis, identify variables that could influence the market potential of the Ayer Road Commercial District, including:

- [1] Presence or absence of water and/or sewer Infrastructure
- [2] Current zoning framework
- [3] Population and demographics of the trade areas
- [4] Transportation system
- [5] Identify any potential impacts (positive or negative) of Harvard’s proximity to competing commercial centers such as Littleton/Westford, Hudson/Marlborough, and Leominster/Fitchburg.

Based on SWOT analysis, describe the challenges and opportunities for attracting new growth from external market, growing new businesses within Harvard, and maintaining and growing existing businesses in Harvard.

- e. **Scenario Development** – Develop a low, medium, and high potential set of threshold “change” scenarios (evaluation points) based on either maintaining or overcoming limiting variables identified in SWOT Analysis. In addition, thresholds for not providing water, sewer, and appropriate zoning (no change scenarios) should be included to illustrate how the provision of these elements can have a significant impact.

Task 1 shall include a “check in” with Staff and Work Group to discuss initial findings prior to moving on to Task 2.

**Task 2:** Develop Market and Trade Area Analysis – Based on the three (3) change scenarios above and the “no change” scenarios, identify market potential for the corridor with respect to the following market segments:

- [1] Retail
- [2] Dining/entertainment
- [3] Personal and professional services
- [4] Medical and general office
- [5] Institutional
- [6] Research and development, and
- [7] Housing.

The consultant will leverage its results from Task 1 above to identify any uses for which there is unmet demand that could be captured by the Ayer Road Commercial District. These identified uses should be responsive to both existing and anticipated local market conditions, taking into account any ongoing or expected impacts of COVID-19 on development prospects. Each identified use should be accompanied by a description of the challenges and opportunities related to potential expansion or new development locally, including factors contributing to vacancy rates, infrastructure constraints, and potential tax incentives.

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<sup>5</sup> Strategic planning technique evaluating strengths, weaknesses, opportunities, and threats.

The consultant will be asked to specifically examine the local demand for each of the seven (7) market segments noted above but also consider more recent emergent technologies and use categories such as flexible use spaces like coworking centers or shared workspace, and makerspaces; artisan studios; collaborative commercial kitchen space; start-up entrepreneur space; and green and sustainable businesses.

It is preferred that these uses also be evaluated within the lens of mixed-use development—both horizontally and vertically integrated, that aligns with the goals of the Town. The consultant shall quantify future demand for the market segments listed above, over a defined time horizon (e.g., five to ten years), in terms of nonresidential square footage and number of housing units by housing type—for each evaluation point.

Task 2 shall include a “check in” with Staff and Work Group to discuss initial findings prior to moving on to Task 3.

**Task 3:** Determine Area Capture – Develop forecast of subject area capture (\$ and s.f.) and translation into buildable s.f.;

Task 3 shall include a “check in” with Staff and Work Group to discuss initial findings prior to moving on to Task 4.

**Task 4:** Interviews – Conduct interviews with individuals and/or small groups to gain additional insights into market conditions. The Town will help to identify stakeholder individuals and groups if desired. Intercept data gathering would also be helpful.

Task 4 shall include a “check in” with Staff and Work Group to discuss initial findings prior to moving on to Task 5.

**Task 5:** Identify Use and Tenant Mix – Identify an optimal use and tenant mix for the district that optimizes revenue and synergy. Preferably, the consultant can provide several use mix scenarios that may offer specific levels of tax and other municipal revenue generated.

**Task 6:** Develop Conclusions – Develop general conclusions highlighting the most significant findings and projections of the analysis as a bridge to the resulting market-based strategy and Phase 2 Vision Planning process. This shall include a market-based development strategy based on the (high potential) market analysis. This would be a focused set of market-driven recommendations for retaining, expanding, and recruiting desired businesses as well as to attract commercial, residential, mixed-use, and other types of development. The consultant shall determine any closely comparable communities, if they exist, and note any lessons to be learned from the comparables but also note how Harvard’s characteristics distinguish the community as unique from a market standpoint.

The Consultant shall identify catalytic projects for specific anchor properties within the corridor, if applicable.

### **Market Analysis Additive Alternatives**

The following additive alternatives are an integral part of this proposal. To be responsive, the Respondent shall quote for the base bid and also for the following listed additive alternatives:

**Task 7:** Describe Optimal Mix - Create a description of the optimal tenant mix and housing mix for each 'node' community based upon the projected future absorption trends and other relevant factors.

**Task 8:** Summarize Target Businesses – Recommendations of specific businesses that exist in other communities to target in a recruitment effort, based on the quantified opportunities and needs identified in the study. This also may include specific developers or housing contractors.

**Task 9:** Identify Existing Growth Businesses in Harvard – Recommendations of specific businesses that already exist in Harvard that could expand or diversify to capitalize on identified market opportunities.

**Task 10:** Branding & Marketing – Any branding or marketing recommendations to enhance the image of Harvard as business-friendly. Any recommendations in this area should include the specific identity to be promoted as well as methods to promote it.

#### *Fiscal Impact Analysis*

**Administrative Tasks:** See Administrative Tasks for Market Analysis element.

**Task 1:** Analysis of projected municipal fiscal impact of the findings of the Market Analysis as applicable to fiscal impact, including:

- a. Each threshold scenario (low, medium, high) plus each market segment (land use type) for each.
- b. Using representative real estate values, occupancy and use estimates, and municipal service costs to determine likely impacts.
- c. Land use categories shall include but not be limited to the market segments (land uses) evaluated in the Market Analysis:
  - Retail
  - Dining/entertainment
  - Personal and professional services
  - Medical and general office
  - Institutional
  - Research and development
  - Housing
  - Mixed-use retail or office and residential
  - Public passive use parkland or open space
  - Public recreation lands

- d. Findings for residential land uses should address how impacts vary by residential unit bedroom count and by tenure, and any other relevant characteristics.
- e. Fiscal impact analysis shall present annual average costs and revenues associated with existing land uses and annual marginal costs and revenues expected for new development.
- f. Analysis should include consideration of municipal costs including but not limited to:
  - General Government
  - Education
  - Public Safety (Police, Fire, EMS)
  - Public Works
  - Parks and Recreation
  - Health and Human Services
  - Water and Sewer

**Task 2:** Develop a Fiscal Impact Modeling Program for future use by Harvard. The digital program:

- a. Shall be similar to the one used to project the above referenced impacts but will allow users to enter area- and scenario-specific data inputs to more precisely project the fiscal impacts of development in a specific place.
- b. Will allow for Harvard to test scenarios such changes in zoning, allowing for multiple criteria to be changed for evaluative purposes.
- c. Should be user-friendly and accessible for use without the need of special software.

## **Deliverables**

### 1. Administrative

- a. Kickoff Meeting delineated in Scope of Work
- b. Four (4) updates to Staff/Work Group at specific milestones noted in Scope.
- c. Weekly progress summaries emailed to Staff.
- d. Optional: Presentation of Findings noted in Scope of Work.

### 2. Market Analysis

- a. *Task 1 Deliverables:* Task 1 Check-In and any draft findings documents related to Task 1 Scope of Work.
- b. *Task 2 Deliverables:* Task 2 Check-In and any draft findings documents related to Task 2 Scope of Work.

- c. *Task 3 Deliverables:* Task 3 Check-In and any draft findings documents related to Task 3 Scope of Work.
- d. *Task 4 Deliverables:* Task 4 Check-In and any draft findings documents related to Task 4 Scope of Work.
- e. *Task 5 Deliverables:* Any draft findings documents related to Task 5 Scope of Work.
- f. *Task 6 Deliverables:* A final project report compiling all draft findings and recommendations including tables, maps, and appendices, as applicable. Market Analysis report deliverable should include a summary table similar to that depicted below. While simplistic, it exemplifies the types of data and data structure that Harvard is seeking so that it can be portrayed to the lay public. Detailed tables for specific use categories and scenarios should also be easy to read and understand. The final report shall also include a set of infographics to be used by the Town to share the findings with the public and be easily understood and digestible.

Deliverables for Additive Alternatives shall be recommended by the consultant for discussion.

		Commercial ☐	Industrial/R&D ☐	Other Non-Res ☐	Residential (Units)	Annual Tax Revenue (Current Rate)	Annual Tax Revenue (Split Tax)	Hotel/Motel Tax Revenue (Current Rate)	Meals/Drink Tax Revenue (Current Rate)	Other Revenue (Current Rate)
w/ Water & Sewer	High Range Assumption	999,999	999,999	999,999	1,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000
	Mid Range Assumption	999,999	999,999	999,999	500	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000
	Low Range Assumption	999,999	999,999	999,999	250	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000
w/o Water & Sewer	High Range Assumption	55,555	55,555	55,555	300	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000
	Low Range Assumption	55,555	55,555	55,555	100	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000

### 3. Fiscal Impact Analysis

The project deliverables will be:

- a. A report that provides guidance Harvard on the impacts of future land uses and use mixes and levels, and
- b. A fiscal impact model tool that allows staff to customize findings using local data.

#### **Timeline**

Clearly include in proposal the proposed timeline for completion of the project, including any significant benchmark dates.

#### **Cost**

Respondent should clearly define the proposed cost of the project, itemizing out the additive alternates. Harvard's maximum budget for this bid is **\$45,000**.

If there are any areas of the project that may be 'value engineered' by utilizing local resources (past studies, in-kind staff assistance, etc.) it would be helpful to include that information.

### **Section 3 – Proposal Format and Content**

#### **Submittal Requirements**

While there is no specific page limit for the proposal, we urge respondents to emphasize the project approach and be concise, succinct, and economical with the other content. The proposal submittal must contain the following information:

1. Cover Letter. Provide name and address of the firm(s) and project contact person with address, phone and email. Summarize your understanding of the project scope and services being required. Provide a statement indicating your ability to provide timely services for this project and to meet the requirements of the proposed schedule. Indicate your acceptance of the requirements of this RFP. The cover letter must be signed by a duly authorized official of the firm. Consortiums, joint ventures, or teams submitting proposals must establish that contractual responsibility rests solely with one company or one legal entity. Each submittal should indicate the entity responsible for execution on behalf of the proposal team.

**NOTE:** For items 2-5 below, please develop a short executive summary and provide the detailed information in appendices.

2. Project Team
  - a. Prepare an organizational chart showing the project team.
  - b. Provide resumes or a listing of information for each person included in your proposed project team. State the educational background of each individual, years of experience, length of employment with your firm, and previous project experience. For each person, list specific responsibilities on this project, experience on economic impact studies of similar size and type, specific qualifications applicable to this project, and any current work assignments which may affect availability for this project.
  - c. Any capacity and/or resources available that would enable you to back up and support the assigned staff.
  - d. Areas of specialization, if any.
  - e. Two (2) case studies each involving market analysis and fiscal impact analysis plus related business development work.

- f. For the project manager and other “key” team members proposed, provide at least three (3) client references (contact person, phone, email and summary of project). Experience in small towns and villages is highly desirable.

### 3. Project Approach

Please provide a description of your project approach including, but not limited to, all items listed above; a detailed work plan and schedule; and estimated personnel hours, if available. Any changes that your team might recommend to the overall scope of work should be indicated and explained.

### 4. Relevant Experience

Indicate prior experience of your firm with similar projects. In particular, similar projects for similarly sized communities and project types would be most valuable.

### 5. Why Your Firm?

What makes your firm the most qualified to perform this work? Please provide specific reasoning and additional information that would uniquely qualify your team for this project and why Harvard should select you.

### 6. Fee Proposal and Compensation

Each Respondent’s Proposal shall include a Fee Proposal in a separate sealed envelope, using the attached form.

- a. Fee Proposal. Identify lump sum fees for which Respondent would be seeking compensation in total, addressing the project scope detailed on pages 7-12.
- b. Fee Schedule. Please provide a current fee schedule for the types of service(s) that you offer. If referencing basic services costs, include typical staffing expectations and variations that the Town could expect for specific types of projects, if applicable.
- c. Please also provide detailed information on your billing practices (i.e., lump sum, percentage-based, other), including reimbursable cost categories and hourly billing rates by position for additional services. Additional Costs. Identify any additional fees, costs, expenses or reimbursable fees for which Respondent would be seeking compensation.

## **Section 4 – Review of Proposals and Selection**

### Selection Criteria

Upon receipt of the proposals, Community and Economic Development staff will evaluate the completeness of each proposal. All complete proposals will be forwarded to all members of the project work team. The work team will rely on the qualitative

information contained and presented in the proposals, interviews, and reference checks in making the decision to select the most qualified firm to provide services for this project. The following selection criteria, in order of importance, will be used:

- [Technical strength and innovation of the project approach including clarity in explanation](#)
- [Firm background and applicable experience](#)
- [Knowledge and experience of project team as it relates to project specifics](#)
- [Past performance including strength of references](#)
- [Regional economy insight](#)
- [General strength of project team](#)

#### Selection Criteria Explanation

1. Appropriate explanation detailing the approach to the project objectives and scope of work as stated above in a way that laypersons conducting a review of proposals can easily understand the approach.

*Effectively tying the approach together to what data will be generated and why each data set is important to meeting Town objectives will tend to score higher. Effective responses should show how the firm anticipates managing the relationship with the Client in terms of clarity and frequency of communication, accessibility for questions, and overall client satisfaction.*

2. Firm background and applicable project experience.

*Firms with specific experience with both a similar market analysis project and also fiscal impact analysis for municipalities will tend to score high. If this experience is related to a similar commercial district and/or if the fiscal impact work is tied to the market analysis results, then the optimal score is more likely.*

3. Project team members' experience with comparable projects.

*If the specific team members proposed to be assigned to this project and the project manager, each have strong experience with the type of work described above, responses will tend to score higher than teams that do not have this experience. Response should provide an organizational chart showing the interrelationship of key personnel to be provided by the Respondent for this project and identifying the individuals and associated firms (if any) who will fill the roles of Project Manager and any other key roles identified by the Respondent. Specifically, describe the time commitment, experience and references for these key personnel. Identify any services to be provided by Sub-consultants.*

4. Past performance with similar organizations as noted by references.

*Strong references from similar communities for similar projects will tend to score higher. The closer that similar projects mirror the Harvard project, the higher the evaluation of this criteria will score. Each reference will be evaluated consistently using the following areas:*



- *Quality of Work Product*
- *Execution of Scope (vendor execution, issue resolution)*
- *Project Benchmarks and Timeline (adherence, lessons learned)*
- *Adherence to Budget (any cost overruns, required agency personnel, total cost of ownership)*
- *Customer Relations (responsiveness and other criteria)*
- *Overall Satisfaction (agency level, school level, individual level)*

5. Knowledge and insight into the local and/or regional economy.

*A firm's familiarity and knowledge with the regional economy in which Harvard is situated is a strong evaluative advantage.*

6. General skills, abilities, and knowledge of personnel.

*The firm's history, reputation, and general experience in real estate data and fiscal data will be an important factor. The overall strength of staffing and personnel will also be important.*

It is the policy of The Town of Harvard (hereinafter "The Town") to ensure impartial, equitable, and comprehensive proposal evaluations based on the evaluation criteria listed above, and to select the source (or sources) whose offer meets the our technical, policy, and programmatic goals. The Town will conduct a technical review of each conforming proposal. Conforming proposals comply with all requirements detailed in this RFP; proposals that fail to do so may be deemed non-conforming and may be removed from consideration. The Town's intent is to review proposals as soon as possible after they arrive; however, proposals may be reviewed periodically for administrative reasons.

Award(s) will be made to proposers whose proposals are determined to be the most advantageous to The Town, all factors considered, including the potential contributions of the proposed work to the overall planning program and the availability of funding for the effort.

Based on qualitative evaluation of written proposals, the Fee Proposal will be opened for each responsive proposal. The Work Group may ask one or more firms and their representatives to make a presentation to the Work Group. Harvard reserves the right to not select a firm as part of this process.

## **Section 5 – Standard Proposal Information**

### **Authorized Signature**

An individual authorized to commit the Respondent to the provisions of the RFP must sign all proposals.

### **Preparation Costs**

The Town of Harvard, including all members of the project leadership team, will not pay any cost associated with the preparation, submittal, presentation or evaluation of any proposal.

### **Conflict of Interest**

Respondents must disclose any instances where the firm or any individuals working on the project has a possible conflict of interest and, if so, the nature of that conflict. Harvard reserves the right to cancel the project if any interest disclosed from any source could either give the appearance of or cause speculation as to the objectivity of the Respondent's proposal. Harvard's determination regarding any questions of conflict of interest is final.

Non-Collusion Form

Tax Compliance Form

Pricing Sheet

### **Respondent's Certification**

By signature on the proposal, the Respondent certifies that it complies with:

1. The laws of the Commonwealth of Massachusetts.
2. All applicable local, state and federal laws, codes and regulations.
3. All terms, conditions, and requirements set forth in this RFP.
4. A condition that the offer will remain open and valid for a period of ninety (90) days, and any condition that the firm and/or any individuals working on the project do not have a possible conflict of interest. If the Respondent fails to comply with the provisions stated here, Harvard reserves the right to reject the proposal.