



(508) 906-3027
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TOWN OF MEDFIELD

Office of the

TOWN PLANNER

TOWN HOUSE, 459 MAIN STREET
MEDFIELD, MASSACHUSETTS 02052-2009

TOWNWIDE MASTER PLAN RFP Q & A

1. What is the total budget? **\$150,000 (including reimbursables)**
2. Can a consultant propose on more than one team? **Yes**
3. Are work samples and project sheets included in the 20-page limit? **No**
4. The RFP requires evidence of insurance coverage “as shown in attachment B” – see number 9 on page 9. But I can’t find attachment B referring to this...the attachment B in the RFP refers to compliance and tax issues. Can you provide the Town’s requirements for insurance or confirm we can submit our standard coverage certificate and this will meet RFP requirements? **Apologies for the confusion! I must have lost track of that in a reorganization. It's actually in Section IX. General Instructions:**
Insurance: The Consultant shall obtain and maintain during the term of the contract general liability and auto liability coverage in limits of \$1,000,000/\$1,000,000 and for workers’ compensation and employer’s liability coverage as defined by statute. All policies shall identify the Town as an additional insured (except Workers’ Compensation).



REQUEST FOR PROPOSALS
CONSULTANT SERVICES
TOWN OF MEDFIELD

The Town of Medfield, acting through its Townwide Master Planning Committee (TWMP) seeks proposals from professional planning consultants to prepare a Townwide Master Plan (TWMP) pursuant to MGL Ch 41 §81D with community participation, and a review of the Town's existing town plans, studies, documents, zoning bylaw and subdivision rules and regulations to incorporate the goals of the Master Plan.

All applicants/individuals interested in providing these professional services may obtain a copy of the Request for Proposals (RFP) by mail from Sarah Raposa, Town Planner, 459 Main Street, Medfield, MA 02052, by phone at (508) 906-3027 or by email at sraposa@medfield.net. Copies of the RFP are also available at the Town House (459 Main Street, Medfield, MA) during regular business hours. All prospective vendors are urged to submit contact information in order to receive updates or addendums.

All proposals are due on Friday, May 24, 2019, at 10:00 AM. One (1) formal response, twenty (20) copies, and one (1) electronic copy (on a flash drive) of the proposal must be submitted to Sarah Raposa in the Town Hall by this date and time. All submissions must be clearly labeled "TWMP RESPONSE AND QUALIFICATIONS" on the exterior of the envelope. A separate fee proposal must be received at the same time in a separate, sealed envelope marked "TWMP Price". Late proposals will not be accepted. The Town reserves the right to reject any or all proposals. Upon selection of the successful candidate the TWMP will make recommendation to the Board of Selectmen who will in turn execute the contract.

KRISTINE TRIERWEILER
TOWN ADMINISTRATOR

Released: Wednesday, April 24, 2019
Medfield Press: Friday, May 3, 2019
Central Register: Monday, May 6, 2019



I. Purpose

The Town of Medfield, acting through its Townwide Master Planning Committee seeks proposals from professional planning consultants to prepare a Townwide Master Plan with community participation, and a review of the Town's existing town plans, studies, documents, zoning bylaw and subdivision rules and regulations to incorporate the goals of the Master Plan. Medfield has not undertaken a Comprehensive Master Plan Update process as described in MGL Chapter 41 Section 81D, since 1997. The Master Plan Update is expected to take approximately one year, with a planning horizon of twenty years, and will provide a basis for decision-making about land use planning and redevelopment, budget preparation and capital improvement planning for public facilities and services, and economic development for the Town of Medfield's future.

The master planning process should have a maximum amount of community involvement and public participation to:

- define the goals, vision and aspirations of the community for the next twenty years,
- recognize the unique history, attributes and needs of Medfield,
- build on existing plans, studies and reports,
- coordinate with the Commonwealth of Massachusetts and other regional plans, and
- define and schedule specific actions necessary to achieve the objectives of each functional element and overall vision addressed in the Plan.

II. Background

Medfield is a suburban community located approximately 20 miles southwest of Boston. The town's large preservation areas, historic downtown, and neighborhoods of single-family homes create a small-town character, despite being close to a major metropolitan area. Many families move to Medfield for the high quality of life and highly rated school system.

- History – Medfield was incorporated as the 43rd town in the Massachusetts Bay Colony in 1651. While primarily agrarian for the majority of its history, Medfield's economy was also driven to various degrees by straw hat manufacturing from 1801 through the mid-20th Century. Additionally, the Medfield State Asylum, later known as the Medfield State hospital, opened on 425 acres in 1896, shaping the town's land use and population until its closure in 2003. In 2014 the town purchased the majority of the former state hospital land from the Commonwealth; its final disposition and use has not yet been determined.
- Location – Medfield is a metro-west suburb located approximately 20 miles southwest of Boston, situated between Interstate routes 95 and 495. State Route 109, the second busiest undivided highway in the Commonwealth, bisects downtown Medfield as it connects Boston with towns south of the Mass Pike and north of I-95 through its terminus in Milford. State Route 27, also a two lane undivided highway, intersects on a north-south access with SR109 in the town center. The closest public transportation nodes are the Franklin Line commuter rail station in Walpole Center, approximately 5 miles southeast of downtown Medfield, and the Needham Line station at Needham Junction, 9 miles northeast of downtown.



- Geography/Topography – The land area encompasses approximately 14.5 square miles and contains a typical New England glaciated landscape: relatively flat well-drained soils with lowland areas of streams and ponds, leading to gently sloping uplands, including several steeper hills with slopes. The town is on the Charles River and is bounded by over 1,000 acres of wetlands and floodplains and much of this land forms a part of the Charles River Natural Valley Storage area overseen by the U. S. Army Corps of Engineers. Almost 40% of the town is open space, with the Town or Trustees for Reservation as significant landowners.
- Demographic Trends – Medfield’s population is relatively stable today at a population of 12,888 (2016). Historically the town experienced significant population increases during the following time frames: in 1900 (96%, an anomaly due to the opening of Medfield State Hospital in 1896) and again in the 1960’s (32% increase) and 1970’s (63% increase). According to cleargov.com, the median household income in 2016 was \$147,630; of 4155 households, 15% earned less than \$50,000 a year, while 7% earned less than \$25,000. According to the 2010 Census, approximately 69% of the adult population had a bachelor’s degree or higher. 50% of Medfield households had children under 18. Cleargov.com identifies approximately 18% of the 2016 population in Medfield as over 60 years old. Despite consistently identified need since the 1964 Master Plan, there are few options available for families who wish to downsize as their long-term needs change. A recent survey found that 19% of senior households would be extremely or very likely to move into designated senior housing in Medfield if it were available (See Appendix V).
- Social/Religious/Cultural Trends – It appears that most residents move to Medfield to access the highly rated public schools, reputation as family-centric community, and the relative affordability of real estate in comparison to similar towns. This dynamic leads to significant fluctuations in the school age population even as the total population has remained generally stable since 2000. There is exceptional community participation in volunteer organizations for the schools, town, charities, and houses of worship. All houses of worship in Medfield are either protestant or Catholic denominations, with the exception of a Unitarian Universalist congregation. Reform, Conservative and Orthodox Jewish temples are found in nearby communities; opportunities for worship in the Hindu and Muslim faiths are less convenient but available within 20 miles. An active cultural alliance organization exists to promote the many artisan opportunities and events in music, theatre and the visual arts that the community supports. In the 2010 Census, 91% of households reported English as their first language. In 2018 the Medfield Public Schools reported that 2.9% of their students’ families primarily spoke a language other than English at home.
- Regional Cooperation – Medfield is a part of the Metropolitan Planning Area Commission, a regional planning agency consisting of 101 towns surrounding Boston that share planning, purchasing and work on livability issues for the area.
- Planning Documents– Medfield’s first Master Plan was published in 1964 with an update in 1997. Since then, several planning efforts have been undertaken across various committees and town departments, but no combined or comprehensive effort has been undertaken. This process must incorporate those prior efforts (see Appendix III).



- Housing Patterns – Medfield is a mature suburb of predominantly owner-occupied residential dwellings (90%). There is dense residential (1/4 acre lots) near the historic town center and lot size increases further out (1/2 acre to 2 acres minimum lot size). Modern Colonials in large neighborhoods were built beginning in the 1970’s around the edges of Medfield. Medfield is nearly built out with few scattered parcels of vacant developable land; less than 15% of privately-owned land area is vacant and developable. Almost half of the housing stock has been constructed since 1969. Today, Medfield sees approximately 20 new single-family building permits per year, the majority of these being teardowns and infill condo development near downtown where zoning allows two and multi-family units. More rental units are coming online recently due to implementation of the 2016 Housing Production Plan as overseen by the Affordable Housing Trust Board of Trustees. In 2016, the Medfield Annual Town Meeting voted to establish an Affordable Housing Trust to proactively address the 40B mandates. In 2017 and 2018, the Town of Medfield achieved a one-year Safe Harbor, with multiple future developments in the planning stages to carry forward Safe Harbor Status through the mid 2020’s.
- Business/Industry/Economy – The Town evolved as a rural farming community with pockets of retail in the now extinct Harding-area, industrial straw hat factories near downtown and the operations of Medfield State Hospital. Today there is a small commercial base (about 5%) in the town center (retail, restaurants, services, offices); Industrial/light manufacturing is located beyond the town center in the northwest section. There are no modern box stores, but some chain stores exist in commercial zoning districts along Route 109 (Shaws, Marshalls, Starbucks, Dunkin Donuts, Brothers, CVS, Cumberland Farms). It is unknown how many residents work occasionally or part-time from their homes. Many residents commute outside of Medfield for employment.
- Economic Development/Land-Use/Growth Trends – Almost all commercial uses abut some residential area. The community has an expectation of input into the neighborhood impact of proposed commercial projects, no matter the size. In 2014 the Town purchased the 128-acre former Medfield State Hospital (MSH) from the Commonwealth for the purpose of control over future development. A Strategic Reuse Master Plan for MSH was delivered to the Board of Selectmen in August 2018 and is currently under review (see Appendix V). A Special Town Meeting has been tentatively projected for Fall 2019 to address the future of MSH.
- Government/Administration – Annual Town Meeting (ATM) approved a Home Rule Charter in 1972 to professionalize government operations. Currently Medfield operates under a 3-person Board of Selectmen and Town Administrator structure. Additionally, there is a strong tradition of volunteerism and responsibility for serving in both elected and appointed Town Committees (refer to Appendix IV).
- Education - Medfield Public Schools consistently rank amongst the top schools in Massachusetts. Elementary education is divided amongst 3 grade-level schools: Memorial School (K-1), Ralph Wheelock School (2-3) and Dale Street School (4-5). Blake Middle School (6-8) and Amos Kingsbury High School, most commonly known as Medfield High School (9-12), share a campus close to the Town Center. Dale Street School is currently in the Feasibility Study phase with the MSBA, with a final proposal expected to be brought



before Town Meeting in Fall 2020. In FY 2018 Medfield spent \$15,205 per student; the state average that year was \$17,833, while similarly ranked schools in surrounding districts spent an average of 19,151.

- Public Finance – Moody’s assigned a rating of Aa1 to Medfield noting its \$18.7M General Obligation Bonds in 2015. Town Administration has shown a long-term trend of consistent and conservative fiscal management.

III. Master Plan Strategy, Scope of Work, and Deliverables

The Town of Medfield, under the direction of the Townwide Master Planning Committee (the Committee), is soliciting proposals from qualified multidisciplinary consultant firms for the preparation of a Master Plan that will guide the future growth and development of Medfield. This Plan will help direct actions of the Town boards, commissions and committees, particularly the Planning Board, Town officials and citizens involved with guiding the future evolution of the Town. The Town and staff intend to have a clear, concise Plan that utilizes the latest planning techniques appropriate for a suburban community such as Medfield.

The Committee has been established to assist in selecting a consultant to support the Committee in undertaking the Master Plan process and deliverables. See Appendix II for the Committee’s charter issued by the Board of Selectmen.

The credibility and utility of the Master Plan process and the prospect for its adoption and implementation will rest heavily on strong public participation including development of a set of common values and goals shared by a diverse range of Medfield residents and property owners. The consultant will be expected to propose an effective public participation strategy that, with collaboration from the Committee, successfully elicits a strong understanding of community sentiment on a range of issues facing the Town. The public participation strategy should include interviews of key players, focus groups, internet surveys/activities, public meetings, a booth at “Discover Medfield Day” on Saturday 9/14/19, and/or other innovative methods tailored to the audience and type / specificity of the information being sought.

The Consultant will, to the maximum extent feasible, utilize existing information, reports, and studies on file with the Town and/or provided by the Town (see Appendix III Planning Document Resources). The Consultant will work closely with the Committee to provide the following deliverables:

- Conceive a structure and schedule of Master Plan public participation activities.
- Assemble and analyze existing conditions and project resource constraints/capacity as related to Medfield’s 20 Year Future Goals & Vision per the outcomes of the public process.
- Synthesize information gained into a comprehensive "Master Plan" document that is formatted for easy reading and viewing on screens (delivered in scheduled intervals as draft, revised draft, and final versions) and containing an implementation plan, zoning amendment recommendations, and an executive summary brochure.
 - Master Plan - The consultant will draft a Master Plan as described above to



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- achieve approval and adoption of the Master Plan by the Planning Board, Board of Selectmen, and Town Meeting as a strategy for the future.
- Implementation Plan – The Implementation Plan will 1.) Define the specific municipal actions necessary to achieve the objectives of each element of the Master Plan, 2.) Prioritize implementation activities, and 3.) Include a schedule and key dates for action. As necessary, the implementation plan will be linked to the Town’s capital and/or operating budgets and other related sources of funding and suitable for long-term strategic thinking and decision-making.
 - The Town would like both a high-quality, final document that can be publicly distributed, and a working copy whereby the native text/data/output can be later utilized and/or updated by the Town for other purposes. Therefore, we request both hard copy and electronic copies of all deliverables be provided. Hardcopies of each final deliverable should include five (5) color copies and one unbound master/camera-ready version of each. Electronic copies of each final deliverable should include one electronic version in pdf, using whatever software is recommended to make the product look professional and of a high quality. One version should also be provided at a minimum in Microsoft Word (if not the software used to produce the final document) for text and with accompanying tables and graphics in either Microsoft Excel, GIS or CAD, depending on the specific item. All materials will become the property of the Town of Medfield and may be publicly posted on the Town’s website.
- The Master Plan document should provide all required elements per MGL Chapter 41 Section 81D including:
 - Goals and Policies
 - Land use plan
 - Housing
 - Economic Development
 - Natural and Cultural Resources
 - Open Space and Recreation
 - Services and Facilities
 - Circulation
 - Implementation
 - Plus additional chapters on emerging issues such as sustainability, review of town government, and incorporation of Medfield State Hospital’s Reuse Master Plan (see Appendix V for MSH)
 - Address Town Issues outlined in Committee’s charter (Appendix II)

The Consultant will participate in, organize and collaborate in the Committee meetings. The number of public meetings requiring the Consultant's attendance will be mutually negotiated but is expected to be between 15-20 (including committee meetings, subcommittee meetings, and workshops as needed). The Consultant will work with staff to keep the community well informed as the process moves forward by assisting staff in implementing a successful community outreach program. The Consultant will provide overall project management, content production, and expertise in land-use, transportation, neighborhood design, economic development, market analysis and comprehensive planning.



The outline above is not necessarily all-inclusive and the Consultant will include in the proposal any tasks or alternatives and services deemed necessary to satisfactorily complete the project. Consultants are encouraged to bring both industry expertise and creative ideas tested elsewhere and tailored to Medfield to help the community design the approach that best suits the Town.

IV. Consultant, Committee and Staff Roles

The Consultant will work closely and in harmony with the Committee, including attending at least one Committee meeting each month, facilitating public meetings and forums, preparing background research and reports, and at all times understanding the direction and giving guidance to the Committee with respect to the planning process and objectives and the development of the Master Plan. A primary liaison person or persons will be selected from the Committee for coordination with the Consultant.

Municipal staff will be closely involved, but the consultant is expected to devote the time needed to conduct research, write documents, and participate in meetings as needed with the Townwide Master Planning Committee, other Town boards and committees, subcommittees, and the public. Staff will take primary responsibility for scheduling and posting meetings and will attend meetings as needed. Meeting minutes will be provided by committee members.

V. Project Schedule

Work is expected to start in July 2019 and the finished product will be ready for Planning Board and Board of Selectmen review and adoption in 2020, based upon a mutually agreeable schedule. We expect the process to take approximately 12 months.

VI. Project Budget

Price proposals must be submitted in a separate sealed envelope, clearly marked "*Sealed Price Proposal Enclosed - Master Plan.*"

The consultant shall submit an estimated cost summary, not to exceed \$150,000 (including all reimbursable expenses). The price proposal shall contain the following:

- The fee for the entirety of all services proposed in the non-price proposal;
- A detailed breakdown of the professional service fees by task and sub task and by team member; and
- The hourly rates and overall fee to be charged by the consultant and its sub-consultants for services performed by each team member.

It is the desire of the Town that this contract will be a firm, fixed price agreement. Bidders are encouraged to provide comment as to whether the initial allocation of funds is sufficient to complete all items in the Scope of Work, including reimbursable expenses.

VII. Consultant Qualifications and Selection Criteria

A. Qualifications

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



- A. The firm/team must have at least ten (10) years of experience in business/commercial development, professional design services (planning, architecture, engineering, et al), land planning, public policy, management consulting, and/or municipal funding and financial forecasting.
- B. The principal and project manager to be assigned to this project must be available for meetings with the Town on days or evenings, as required. Key personnel specified in the project proposal are considered to be essential to the work's performance. Firms/teams must commit to at least a 30-day notification period prior to voluntarily diverting any of the specified individuals or resources to other programs or contracts and must mutually agree with the town on a replacement as not to impact the quality or timeline of deliverables.
- C. The firm/team must have previous experience in the management of public information processes and conducting municipal master plans. Completion of two such projects in municipalities in Massachusetts within the last five (5) years is required, and completion of five overall is desired.
- D. The firm/team must have proven experience in the public sector and in working with federal, state, regional and municipal agencies and neighborhood business organizations.
- E. The volume of the firm's current and projected workload must not adversely affect its ability to immediately initiate work and to follow through with the project in a timely and professional manner. The firm and all team members must be capable of devoting a significant amount of time to this project in order to complete the work within the mutually agreed upon project schedule.

B. Selection Criteria

The Town will award the contract to the Consultant offering the most advantageous response to this RFP, taking into consideration all evaluation criteria. The selection process will include an evaluation procedure based on the criteria identified below. The top proposals with the highest scores will be invited to appear for an interview. Negotiations with the top firm will commence and the price proposal will be opened for the top firm at that time. If the Committee fails to negotiate a successful contract, the selection committee will go to the next top ranked firm, open the cost proposal and negotiate a contract.



<i>Score</i>	5	4	3	2	1	0
	Highly Advantageous		Advantageous		Not Advantageous	
I. Plan of Services Ratings will be based on the project approach and schedule. Particular attention will be given to the methods by which the candidate plans to complete all items in the Scope of Work.	Proposal includes a creative and clear understanding of the Town’s needs, a detailed, logical, and highly efficient scheme for addressing all of the required issues and completing all tasks.		Proposal includes a credible scheme for addressing all of the required issues and completing all tasks.		Proposal is not sufficiently detailed to fully evaluate or does not contain components necessary to address all the required issues and completing all tasks.	
II. General Qualifications of Firm Particular attention will be paid to evidence of successful past performance	Candidate has successfully completed multiple projects of similar size and scope, and has a proven track record for completing projects on time, within budget, and on schedule.		Candidate has completed projects successfully and timely.		Candidate has experienced difficulty in completing projects successfully.	
III. Personnel & Resources to be Utilized Rating will be based on evidence that adequate qualified personnel with a background and track record in promoting and sustaining a high degree of participation by stakeholders are assigned to all phases of the project and that sufficient resources are available.	At least one individual from the proposed project staff has substantially contributed to the development of a similar project in Medfield or a similar community.		At least one individual from the proposed project staff has contributed to, or has experience with a similar project.		None of the project staff has substantially contributed to the development of this type of project.	
IV. Experience with similar projects. Rating will be based on experience providing professional services for comprehensive master plan or similar planning projects and effectively collaborating with committees.	The firm has at least five years of experience with comprehensive master plan or similar planning projects of this type. Proposal includes at least three examples of similar projects.		The firm has at least three years of experience with comprehensive master plan or similar planning projects of this type. Proposal includes at least one example of a similar project.		The firm has less than three years’ experience with this type of project.	
V. Completeness & Quality of Proposal Rating will be based on attention to requests contained herein technical approach with emphasis on techniques for incorporating the Town’s needs and concerns of the public into the Project and submission quality that will match final product.	The proposal is complete, concise, informative, and highly detailed. Proposal reflects the ability to perform the work in a superior manner acceptable to the Town		The proposal is complete, informative and meets the criteria for responsiveness.		The proposal is not complete, informative, and responsive.	



VIII. Proposal Submission Requirements and RFP Schedule

Interested qualified firms must submit one (1) formal response, twenty (20) copies of its response (please no binders or plastic covers on the copies), and one (1) electronic copy (on a flash drive) addressing the objectives, scope and schedule described in this RFQ. Responses must include, at a minimum, each of the following:

- A. Sealed Submission #1, clearly marked "TWMP Response and Qualifications" (Responses should be no more than 20 single-sided pages in length, single-spaced, exclusive of required project sheets, resumes, and forms).
 1. General description of the firm/team's experience. Description, with examples, of the firm/team's experience in working with municipalities preparing comprehensive plans, electronic public participation techniques, and conducting public meetings. Include reference to your experience in (1) use of visual materials to illustrate proposed future development scenarios, and (2) community relations, public speaking, facilitation, and mediation.
 2. A detailed scope of services for the proposed work, including the firm/team's general approach to such work, evidence of the firm/team's understanding of the goals and objectives of the project, and methodology for accomplishing the deliverables as listed in this RFP.
 3. An outline of the schedule for completion of tasks (timeline) as presented in the firm/team's approach to the scope of services.
 4. Description of the assigned staffs' experience, educational background, availability, and chain of responsibility, including the name and title of the principal and project manager assigned to the project, names of all sub-consultants, and resumes of all personnel to be associated with the project.
 5. List of at least three references, including name, title, agency, address, project cost, and telephone number for similar projects completed within the last five years (including dates).
 6. Identification of current and pending work commitments of the firm(s), and a description of how this project will receive adequate attention amid the firm's workload.
 7. Attachment C, Self-Evaluation Worksheet
 8. Other pertinent information about the firm(s) that would aid the Town in making a selection.
 9. Completed Attachment A: Tax Compliance Form and Non-Collusion Affidavit (not included in page limit).
 10. Evidence of insurance coverage, including general and professional liability and worker's compensation insurance as shown in Attachment B.
- B. Sealed Submission #2, clearly marked "TWMP Price".
 1. Completed Attachment D: Price Form with original signature
 2. Detailed breakdown by task of professional service fees, assigned project staff and hourly billing rates of staff for the proposers overall team and team members.



Responses which are most advantageous based upon consideration of all the evaluation criteria will be selected.

Contact Sarah L. Raposa, AICP, Town Planner at sraposa@medfield.net to be included in the RFP distribution list. Questions concerning this Request for Proposals must be submitted in writing to: Sarah L. Raposa, AICP, Town Planner, 459 Main Street, Medfield, MA 02052 or at sraposa@medfield.net by the date listed in the schedule listed below. Written responses will be emailed to all bidders on record as having picked up the RFP on the date listed in the schedule listed below.

Responses must clearly address all the submittal requirements; that is, the response should include a section addressing all of the minimum qualifications, the minimum submittal requirements, and each of the review criteria. The response will be reviewed based on each of these items and it will be to the benefit of the responder to clearly address each of the items. Where the requirements specify a minimum level of experience, indicate the dates of said experience.

The Townwide Master Planning Committee will review responses. Finalists will be invited to review their Responses in an interview with the full committee.

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

<i>RFP Selection Schedule</i>		
1.	Committee Finalize RFP	By end of March
2.	BoS Review/Approve RFP	April 23, 2019 (in packets by 4/18)
3.	RFP Release	April 24, 2019
4.	Ad in Central Register	April May 6, 2019 (Send to Central Register by April 24, 2019)
5.	Ad in Medfield Press	April May 3, 2019 (Send to Medfield Press by April 26, 2019)
6.	Q's Due	May 14, 2019 at 10:00 am
7.	A's Distributed	May 15, 2019
8.	Proposals Due	May 24, 2019 at 10:00 am
9.	Proposal Review by TWMP	May 24 – June 10
10.	Shortlist Proposals	Special Meeting: Monday, June 10, 2019
11.	Shortlisted Consultants Notified	By June 13, 2019
12.	Shortlisted Consultant Interviews & Selection by TWMP (open price proposal)	Thursday, June 27, 2019
13.	Committee Award Notification to Selected Consultant (negotiation, if needed)	Friday, June 28, 2019
14.	Committee Consultant Selection Recommendation to Board of Selectmen; Contract Negotiation & Contract Execution by Board of Selectmen	Contract preparations June 28-July 10 Draft contract due in BoS packets by Thursday, July 11. Contract signed by BoS on Tuesday, July 16, 2019
15.	Work Commences	July 17, 2019
16.	First Full Committee Meeting with Consulting Team	July 25, 2019



IX. General Instructions

Acceptance or Rejection of Proposal: The Town reserves the right to reject any or all proposals.

Fee for Services: The proposal fee shall include all labor, materials, travel, insurance, and all other necessary expenses to fulfill the conditions of the contract.

Proposal Authorization: The proposal must be signed by an individual authorized to enter into a contract with the Town. In the case of a corporation, the title of the officer signing must be stated and the corporate seal must be affixed. In the case of a partnership, the signature of at least one of the partners must follow the firm name using the term "members of firm", use the term "doing business as _____," or "Sole Owner."

Contract: The Consultant to whom the contract is awarded will be required to execute a written contract within seven (7) days from the date that they are notified of the award. In case of failure to do so, they will be considered as having abandoned the contract. A copy of the Town's standard contract is attached as Appendix I. The Town shall have the right to periodically review the performance of the Consultant and to terminate the contract with or without cause upon thirty (30) days' notice to the Consultant, provided that in the case of termination without cause the Consultant will be paid for work completed through the date of termination.

Insurance: The Consultant shall obtain and maintain during the term of the contract general liability and auto liability coverage in limits of \$1,000,000/\$1,000,000 and for workers' compensation and employer's liability coverage as defined by statute. All policies shall identify the Town as an additional insured (except Workers' Compensation).

Indemnification: The Consultant shall indemnify, defend, and hold the Town harmless from and against any and all claims, demands, liabilities, actions, causes of actions, costs and expenses, including attorney's fees, arising out of the Consultant's breach of contract, negligence or misconduct of the Consultant, or the Consultant's employees or agents.

Payment of Invoices: The Town shall make payments within thirty (30) days after its receipt of invoice assuming that the work performed is to the full and complete satisfaction of the Town Planner. Progress payments will be negotiated in the contract.

Assignment of Contract: The Consultant who is awarded the contract shall not assign, transfer, convey, sublet or otherwise dispose of said contract, or his right, title or interest in or to the same, or any part thereof, without prior consent in writing from the Board of Selectmen, endorsed on or attached to the contract.

X. Required Statements/Forms

Per M.G.L. c.7 section 38H(e) and the Town of Medfield. The following statements must be signed individually and included in Proposal submittal:



Attachment A
Certificate of Non-Collusion

The undersigned certifies under the 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 person submitting contract/bid

Date

Name of Business

Attachment B
Certificate of Tax Compliance

Pursuant to M.G.L. c.62C §49A, I certify, under penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

*Social Security Number or
Federal Identification Number*

Signature of Individual or Corporate Name

Corporate Officer (if applicable)



Attachment C
Proposal Self-Evaluation Worksheet

PROPOSAL: _____

- I. Plan of Services** - Ratings will be based on the project approach and schedule. Particular attention will be given to the methods by which the candidate plans to complete all items in the Scope of Work.
- **HA (5)** - Proposal includes a detailed, logical, and highly efficient scheme for addressing all of the required issues and completing all tasks.
 - **AD (3)** - Proposal includes a credible scheme for addressing all of the required issues and completing all tasks.
 - **NA (1)** - Proposal is not sufficiently detailed to fully evaluate, or does not contain components necessary to address all the required issues and completing all tasks.

Comments: _____ Numerical Score (0-5): _____

- II. General Qualifications of Firm** - Particular attention will be paid to evidence of successful past performance
- **HA (5)** - Candidate has successfully completed multiple projects of similar size and scope, and has a proven track record for completing projects on time, within budget, and on schedule.
 - **AD (3)** - Candidate has completed projects successfully and timely.
 - **NA (1)** - Candidate has experienced difficulty in completing projects successfully.

Comments: _____ Numerical Score (0-5): _____

- III. Personnel & Resources to be Utilized** - Rating will be based on evidence that adequate qualified personnel with a background and track record in promoting and sustaining a high degree of participation by stakeholders are assigned to all phases of the project and that sufficient resources are available.
- **HA (5)** - At least one individual from the proposed project staff has substantially contributed to the development of a similar project in Medfield or a similar community.
 - **AD (3)** - At least one individual from the proposed project staff has contributed to, or has experience with a similar project.
 - **NA (1)** - None of the project staff has substantially contributed to the development of this type of project.

Comments: _____ Numerical Score (0-5): _____



IV. Experience with similar projects - Rating will be based on experience providing professional services for comprehensive master plan or similar planning projects and effectively collaborating with committees.

- **HA (5)** - The firm has at least five years of experience with comprehensive master plan or similar planning projects of this type. Proposal includes at least three examples of similar projects.
- **AD (3)** - The firm has at least three years of experience with comprehensive master plan or similar planning projects of this type. Proposal includes at least one example of a similar project.
- **NA (1)** - The firm has less than three years' experience with this type of project.

Comments:

Numerical Score (0-5): _____

V. Completeness & Quality of Proposal - Rating will be based on attention to requests contained herein technical approach with emphasis on techniques for incorporating the Town's needs and concerns of the public into the Project and submission quality that will match final product.

- **HA (5)** - The proposal is complete, concise, informative, and highly detailed. Proposal reflects the ability to perform the work in a superior manner acceptable to the Town.
- **AD (3)** - The proposal is complete, informative and meets the criteria for responsiveness.
- **NA (1)** - The proposal is not complete, informative, and responsive.

Comments:

Numerical Score (0-5): _____



Attachment D
PRICE PROPOSAL FORM
(To be placed in a separate sealed envelope)

Professional Consultant Services
TOWN OF MEDFIELD MASTER PLAN

CONTRACTOR: Town of Medfield

 459 Main Street

 Medfield, MA 02052

PROPOSER: _____

PROJECT: TOWN OF MEDFIELD TOWNWIDE MASTER PLAN

PRICE:

Master Plan	
Implementation Table	
<i>Other</i>	
Total:	

Signed

Title

Print Name

Date Signed



Appendix I
Standard Contract

AGREEMENT FOR CONSULTING SERVICES
RE: MASTER PLAN

AGREEMENT made this ___ day of ____ 20__, by and between the Town of Medfield, a municipal corporation acting by and through its Board of Selectmen (hereinafter: "Town") and _____ (hereinafter: "Consultant"): Town hereby retains Consultant to perform consulting services for it, upon the following terms and conditions:

1. Services to be Provided - Consultant shall provide the services consisting of the Tasks outlined in its _____ (date) proposal, a copy of which is attached hereto as "Attachment A", as well as all services necessary or incidental thereto.
2. Fee for Services - Consultant's total fee for services shall be _____ Dollars (\$ _____) including reimbursable expenses for the Tasks outlined in "Attachment A". Consultant shall not exceed these amounts without prior written authorization from Town. Said fees shall cover all services provided by Consultant and all expenses incurred by Consultant in providing same.
3. Timing of Services - Consultant shall commence work promptly following its receipt of notice that Town has executed this agreement and shall complete said services according to schedule contained in "Attachment A".
4. Payment for Services - Consultant shall bill Town for services which Town has agreed to pay on an hourly basis and Town shall pay Consultant within thirty (30) days.
5. Consultant's Personnel - The Consultant's employees and Consultant's consultants shall be those identified in Attachment A and no others without prior written approval of Town.
6. Consultant's Standard of Care - The Consultant shall perform its services and obligations hereunder in conformity with the standard of professional skill and care applicable to established consulting firms.
7. Town's Ownership Rights in Consultant-Prepared Documents - The studies, designs, plans, reports and other documents prepared by the Consultant for this Project shall be considered the legal property of Town, who shall retain all common law, statutory and other reserved rights, including the copyright. Town may use such documents in connection with the completion of the Project regardless of whether Consultant is in default. The documents shall not be used by Consultant or others on other projects except with the prior written consent of Town and the payment of appropriate compensation if specified by Town PROVIDED THAT Consultant may make use of the documents prepared by Consultant for this project for marketing purposes.
8. Arbitration Only if Mutually Agreed-Upon - Claims, disputes, or other matters in question between the parties to this Agreement arising out of or relating to this Agreement or breach thereof may be subject to and decided by arbitration only if the parties mutually agree in writing to do so.
9. Termination
 - a. For Cause - The Town shall have the right to terminate this Agreement if (i) Consultant neglects or fails to perform or observe any of its obligations hereunder and a cure is not effected by Consultant within seven (7) days next following its receipt of a termination notice issued by the Town, (ii) if an order is entered against Consultant approving a petition for an arrangement, liquidation, dissolution or similar relief relating to bankruptcy or insolvency and such order remains unvacated for thirty (30) days; or (iii) immediately if Consultant shall file a voluntary



- petition in bankruptcy or any petition or answer seeking any arrangement, liquidation or dissolution relating to bankruptcy, insolvency or other relief for debtors or shall seek or consent or acquiesce in appointment of any trustee, receiver or liquidation of any of Consultant's property. The Town shall pay all reasonable and supportable costs incurred prior to termination, which payment shall not exceed the value of services provided.
- b. For Convenience - The Town may terminate this Agreement at any time for any reason upon submitting to Consultant thirty (30) days prior written notice of its intention to terminate. Upon receipt of such notice, Consultant shall immediately cease to incur expenses pursuant to this Agreement unless otherwise directed in the Town's termination notice. Consultant shall promptly notify the Town of costs incurred to date of termination and the Town shall pay all such reasonable and supportable costs which payment shall not exceed the unpaid balance due on this Agreement.
- c. Return of Property - Upon termination, Consultant shall immediately return to the Town, without limitation, all documents, plans, drawings, tools and items of any nature whatever, supplied to Consultant by the Town or developed by Consultant in accordance with this Agreement.
10. Notice - Any notice required to be given to Consultant under the terms of this Agreement shall be in writing and sent by registered or certified mail, postage prepaid, return receipt requested, to: _____ (*consultant address*) or such other address as Consultant from time to time may have designated by written notice to the Town and shall be deemed to have been given when mailed by the Town. Any notice required to be given to the Town by the Consultant under the terms of the Agreement shall be in writing and sent by registered or certified mail, postage prepaid, return-receipt requested to: Board of Selectmen, Town House, 459 Main Street, Medfield, Massachusetts 02052 or such other address as the Town from time to time may have designated by written notice to the Consultant and shall be deemed to have been given when mailed by the Town together with simultaneous copy to Mark G. Cerel, Town Counsel, at Medfield Professional Building, Post Office Box 9, Medfield, MA 02052.
11. Independent Contractor - The Consultant is an independent contractor and is not an agent or employee of the Town and is not authorized to act on behalf of the Town.
- a. The Consultant shall supply, at its expense, all equipment, tools, materials and supplies to accomplish the work.
- b. The Town will not withhold Federal, State or payroll taxes of any kind, on behalf of the Consultant or the employees of the Consultant.
- c. The Consultant is not eligible for, and shall not participate in, any employee pension, health or other fringe benefit plan of the Town.
12. Complete Agreement - This Agreement supersedes all prior agreements and understandings between the parties and may not be changed unless mutually agreed upon in writing by both parties.
13. Governing Law - Venue - This Agreement shall be governed by the law of the Commonwealth of Massachusetts. Any legal action arising from this Agreement shall be brought by either party only in the Dedham District Court located in Dedham, Norfolk County, Massachusetts.
14. Enforceability - In the event any provision of this Agreement is found to be legally unenforceable, such unenforceability shall not prevent enforcement of any other provision of the Agreement.
15. Liability Insurance Requirements - The Consultant shall at its own expense obtain and maintain a Professional Liability Policy covering negligent error, omissions and acts of the Consultant, and of any person or business entity for whose performance the Consultant is legally liable, arising out of the performance of this Agreement in an amount equal to Five Hundred Thousand Dollars (\$500,000.00). The insurance shall be in force from the date of this Agreement until the expiration of the applicable period of limitations. The Consultant shall notify the Town should coverage become unavailable during that period.



The Consultant shall obtain and provide a certificate of insurance for each consultant employed or engaged by Consultant, evidencing the existence of the same type of policy and coverage.

The Consultant shall also maintain liability insurance for all vehicles and equipment, which it owns or operates in connection with the project.

The Consultant shall also obtain and maintain in force worker compensation, as required by law.

Certificates evidencing that the required insurance coverage is in effect shall be submitted by the Consultant to Town prior to the signing of this Agreement. Any cancellation of insurance whether by the insurers or by the insured shall not be valid unless written notice thereof is given by the party proposing cancellation to the other party and to Town at least thirty (30) days prior to the intended effective date thereof, which date shall be stated in such notice.

In Witness Whereof, Town and Consultant have each caused this agreement to be executed by its duly-authorized representative(s) on the date contained on the first page hereof.

Town of Medfield, by its
Board of Selectmen:

Consultant:
_____, by

Gus Murby

Print Name / Title

Osler L. Peterson

Signature

Michael T. Marcucci

Approved as to form:

Mark G. Cerel, Medfield Town Counsel

This is to certify that the Town of Medfield has appropriated One Hundred and Fifty Thousand Dollars (\$150,000), including reimbursable expenses, for the Consultant's services specified in the foregoing Agreement.

Town of Medfield, by:

Joy Ricciuto
Town Accountant



Appendix II
Medfield Townwide Master Planning Committee Charter
(Adopted January 8, 2019)

Committee Composition

Fifteen (15) members appointed by the Board of Selectmen. Seven (7) will be at-large members. Each of the following boards or committees will appoint one member of the committee:

Planning Board
School Committee
Parks & Recreation Commission
Warrant Committee
Conservation Commission
Water & Sewer Board
Permanent Planning & Building Committee
Board of Selectmen
Ex-officio: Town Planner, Town Administrator (or her designee)

Term: through the 2020 Annual Town Meeting

Meetings: the Committee will set its own meeting schedule but is expected to meet at least monthly. The Committee may also form one or more subcommittees to address specific aspects of the Master Plan.

Responsibilities

- A. **Master Planning Consultant.** The Committee is authorized to retain one or more consultants to support the committee, subject to managing the cost of these consultants to stay within the budget provided by the appropriation approved at the 2018 Annual Town Meeting. The Committee shall evaluate RFP responses, and submit recommended consultants to the Board of Selectmen for approval of planned contracts.
- B. **Process Plan.** As a first step after formation of the Committee, the Committee shall develop a detailed process plan, to include the identification of planned consultants whose assistance is desired, for the completion of the Townwide Master Plan.
- C. **Compilation and Assessment.** As part of the process, the Committee shall identify all current plans or planning efforts completed or underway in Medfield that may satisfy the requirements of a Townwide Master Plan under MGL Chapter 41 Section 81D. To the extent possible such existing plans or planning efforts should be incorporated into the Townwide Master Plan to avoid duplication of effort.
- D. **Financial Impact:** The Committee, in the final draft Townwide Master Plan, should evaluate the financial effects to the Town and taxpayers of any proposed actions in the Master Plan,



including particular components thereof. Any financial assumptions used shall be based on the best current projections concerning Massachusetts' population, overall number of schoolchildren, and trends in technology and housing preferences.

E. Specific Issues to Address.

1. Location of Parks & Recreation Building: As part of the master plan, the committee should analyze the appropriate location of a new Parks & Recreation building. This is a strategic issue for the town and the Master Plan should evaluate the best location (from a planning standpoint) of that building as part of the municipal facilities master plan.
2. Commercial development and zoning: an important town goal as identified by the Board of Selectmen is responsibly increasing our commercial development to relieve the tax burden borne now by residential taxpayers. As part of the Townwide Master Plan, the committee should look to enhance our ability to attract commercial development that is consistent with the town's character. The committee should review whether our current zoning plan fits with the current and projected demands of the marketplace and recommend any zoning changes that would make Medfield more attractive to commercial development, along with any improvements to current commercially zoned town-owned property that could increase the attractiveness of that property to developers.
3. Residential Development: In addition to developing plans to increase Commercial development, the Master Plan should also evaluate strategies to enhance tax-positive residential development. The committee should review whether our current zoning plan fits with the current and projected demands of the marketplace and recommend any zoning changes that would make Medfield more attractive to the types of residential development that would increase the tax base without a corresponding increase in the cost of town services to support the additional development.
4. Beyond evaluating opportunities for tax-positive residential development, the Master Plan should also address how the town can best accommodate demand for 40B housing, community housing, and non-subsidized senior friendly housing, both with respect to locations, and with respect to design guidelines.
5. Town Land. The Committee shall evaluate parcels of town-owned land and consider, as part of the Master Plan, any parcels of land that might be sold to further town goals such as increasing commercial development, affordable housing, or senior housing.



The Committee should also take a comprehensive look at open space in town and identify actions that town should take to ensure full, ongoing access to this land, to include the identification of maintenance activities required to maintain the land and ensure its accessibility by people who want to enjoy the open spaces.

6. Improved Options for Travel Within Town. The Committee shall examine ways to best make major centers of activity in town more accessible to both vehicular and non-vehicular travelers, to include bike access and pedestrian access. Specific points to consider should include, but not necessarily be limited to, plans for sidewalk construction, cross-walks, bike lanes, and pedestrian pathways.
7. Town Infrastructure. The Committee shall assess the compatibility/ consistency between the town's long-range plans for development and long-range plans for town infrastructure development to ensure that both sets of plans are effectively supportive of the overall direction being taken by the town.

To put this another way, the Committee is being asked to “put a stake in the ground” that describes an optimal path for the town to take, moving into the future. Key questions might include making recommendations on the degree to which Medfield should deliberately plan to become a larger town, as well as what the general mix between commercial and residential development should be to best support the financial needs of the town. This might be best accomplished by creating a “planning scenario” that looks 20 – 30 years into the future and answers questions like the following:

- How big will Medfield's population be?
- How will the demographics of the town's population change from an economic, social, and age standpoint?
- How will the configuration of the town's tax base change?

Deadlines and Deliverables

1. Completion of a Townwide Master Plan for submission to the Planning Board and to Town Meeting.
2. The Committee should prepare a draft RFP(s) to recommend to the Board of Selectmen the selection of a planning consultant or consultants early in the Committee's efforts.

This charter may be amended by a vote of the Board of Selectmen.

- April 23, 2019 – Amended to remove references to timing and Attachment A



Appendix III
List of Planning Related Documents
Organized by Element

(1) **Goals and policies statement** which identifies the goals and policies of the municipality for its future growth and development. Each community shall conduct an interactive public process, to determine community values, goals and to identify patterns of development that will be consistent with these goals.

- [Draft Strategic Town Goals](#)

(2) **Land use plan element** which identifies present land use and designates the proposed distribution, location and inter-relationship of public and private land uses. This element shall relate the proposed standards of population density and building intensity to the capacity of land available or planned facilities and services. A land use plan map illustrating the land use policies of the municipality shall be included.

- [Medfield Zoning Bylaw](#)
- [Subdivision Rules and Regulations](#)
- [495 Compact Plan](#) (2012)
- [Master Plan](#) (1997)
- [Master Plan Study Report No. 8](#) (1964)
- [Medfield EO418 Community Development Plan](#) (2004)
- [Hazard Mitigation Plan](#) (2011)
- [MSH Strategic Reuse Master Plan](#) (2018)
- [MSH Strategic Reuse Master Plan Appendix](#) (2014)
- [MSH Visioning Report](#) (2014)
- [Residential Planning Study](#) (1983)

(3) **Housing element** which identifies and analyzes existing and forecasted housing needs and objectives including programs for the preservation, improvement and development of housing. This element shall identify policies and strategies to provide a balance of local housing opportunities for all citizens.

- [Housing Production Plan](#) (2016)
- [AHT Action Plan](#) (2017)
- [Senior Housing Study Committee Report](#) (2018)
- [Senior Housing Survey](#) (2019)

(4) **Economic development element** which identifies policies and strategies for the expansion or stabilization of the local economic base and the promotion of employment opportunities.

- [Downtown Action Plan](#) (2006)
- [Downtown Summit](#) (2016)
- [Arts & Economic Prosperity Study](#) (2017)
- [Downtown Aesthetics Policy](#) (2014)

(5) **Natural and cultural resources element** which provides an inventory of the significant natural, cultural and historic resource areas of the municipality, and policies and strategies for the protection and management of such areas.

- [Conditionally approved OSRP](#) (2017)
- [Historic Preservation Plan](#) (1999)
- [Arts & Economic Prosperity 5 Customized Report for Medfield](#) (2017)
- [Cultural Arts Facility Feasibility Study](#) (2016)
- [Lee Chapel Existing Conditions Report](#) (2017)
- [Committee to Study Memorials Street Listing](#)



(6) Open space and recreation element which provides an inventory of recreational and resources and open space areas of the municipality, and policies and strategies for the management and protection of such resources and areas.

- [Conditionally approved OSRP](#) (2017)
- [Open Space and Recreation Plan](#) (2002)
- [Bay Colony Rail Trail Study Report](#) (2016)
- [Bay Colony Rail Trail Medfield Section](#) (2017)

(7) Services and facilities element which identifies and analyzes existing and forecasted needs for facilities and services used by the public.

- [Hazard Mitigation Plan](#) (2011)
- Draft Hazard Mitigation Plan (2019)
- Draft Municipal Vulnerability Plan (2019)
- [Municipal Facilities Evaluation and Capital Plan](#) (2017)
- [Findings and Recommendations of the Medfield Capital Planning and Finance Committee](#) (2008)
- [Financial Policy](#) (2018)
- [Investment Policy](#) (2016)
- [Library Strategic Plan](#) (2016)
- [Medfield Municipal Needs Study - DPW - Pfaff - Police - Fire](#) (2002)
- [School Strategic Plan](#) (2016)
- [Sewer Master Plan Update \(Draft\)](#) (2012)
- [Sewer Master Plan Update \(Appendix\) \(Draft\)](#) (2012)
- [Alternatives to Extension of Sewers](#) (1997)
- [Dale Street Project MSBA Population Letter](#) (2018)
- [MSBA Projections](#) (2018)
- [Parks & Recreation Feasibility Study](#) (2017)
- [Energy Reduction Plan](#) (2016)

(8) Circulation element which provides an inventory of existing and proposed circulation and transportation systems.

- Various 109 & 27 Traffic Reports for Development Applications (on file with Planning Department)
- [Parking Study Phase I](#) (2014)
- [Parking Study Phase II](#) (2018)
- [Traffic Signal Warrant Analysis](#) (2016)
- [Low Cost Signal Improvements](#) (2016)



Appendix IV
List of Town Boards, Commissions, Committees, Stakeholders

<u>Boards</u>	Committees (con't)
Affordable Housing Trust	State Hospital Development Committee
Board of Assessors	Senior Housing Study Committee
Board of Health	Sign Committee
Board of Selectmen	Transfer Station and Recycling Committee
Board of Water & Sewerage	Townwide Master Planning Committee
Council on Aging	Warrant Committee
Personnel Board	
Planning Board	
Zoning Board of Appeals	
	Local Organizations (incomplete)
<u>Commissions</u>	American Legion
Cemetery Commission	Bay Circuit Trail
Conservation Commission	Cultural Alliance of Medfield
Historical Commission	Friends of the Library
Historic District Commission	Lions Club
Parks and Recreation Commission	MBTA (The RIDE)
<u>Committees</u>	Medfield After School Program (MAP)
Bay Colony Rail Trail Study Committee	Medfield Food Cupboard
Capital Budget Committee	Medfield Foundation
Community Preservation Act Study Committee	Medfield Garden Club
Cultural Council Committee	Medfield Historical Society
Downtown Study Committee	Medfield Home Committee
Economic Development Committee	Medfield TV
Employee Insurance Advisory Committee	Medfield Youth Baseball-Softball
Lyme Disease Study Committee	MEMO
Medfield Energy Committee	New In Town
Medfield Housing Authority	Norfolk County Mosquito Control
OPEB Trust Committee	PTO
Permanent Building & Planning Committee	The Shelter at Medfield
Permanent Planning and Building Committee	The Trustees of Reservations
Police Chief Search Committee	Upper Charles Conservation Land Trust
School Committee	Vine Lake Preservation Trust
State Hospital Master Planning Committee	Zullo Gallery Center for the Arts



Appendix V Medfield State Hospital (MSH) Summary

THE PROPERTY

The MSH property is located on Hospital Road two miles north of the Medfield town center. Established in 1892, the central green quadrangle and its surrounding buildings represent a historic example of late 19th century alternative design for psychiatric hospitals. MSH was the first psychiatric hospital in Massachusetts to be built on the “cottage plan” with smaller and single use buildings to allow for better light and ventilation. Over the last century, the facility grew in size and many buildings were added to the campus. The facility raised its own livestock and produce, and generated its own heat, light and power distributed through a steam tunnel network to all buildings.

MSH buildings were arranged around a quadrangle giving it the feel of a traditional New England village center or college. Of special importance are the 23 buildings constructed between 1896 and 1897 in a late Victorian style of architecture known as Queen Anne. All of the buildings that face each other on the long sides of the common are mirror images of each other, creating a unique design feature. Total building areas and other information on the existing buildings on the site are provided in Table V-4 in the Master Plan.

The Commonwealth of Massachusetts closed MSH in April, 2003. The Commonwealth subsequently disconnected the sanitary sewer system and water lines to individual buildings. In December of 2014, the Town of Medfield acquired 128 of the hospital property’s 241 acres from the Commonwealth including the 88-acre “core campus” north of Hospital Road and 40 acres of open space south of Hospital Road. There are presently 39 buildings on the core campus site, totaling approximately 676,000 square feet. Both parcels are on the National and Massachusetts Registers of Historic Places and situated within the Medfield Hospital and Farm Historic District. Remaining parcels previously associated with MSH and not acquired by the Town as part of the 2014 transaction are currently owned by various agencies of the Commonwealth, are generally open space, and are not included in the redevelopment effort.

THE MASTER PLAN

The Medfield State Hospital Master Planning Committee (MSHMPC) published the Master Plan in August 2018. The Master Plan represents four years of work by the MSHMPC to develop a comprehensive and coordinated vision of the sustainable redevelopment and reuse of the MSH property.

The MSHMPC conducted extensive outreach to the community in order to discern the priorities and desires of the citizens of Medfield. This was an iterative process involving numerous public interactions in which different concepts were tested with the community. The Master Plan attempts to balance these community desires with the economic and financial objectives of minimal impacts on school and Town services, minimal effects on property tax rates, and the potential for profitable development from the real estate developer’s perspective. Medfield’s reuse priorities for MSH may be summarized as follows:

- **Achieve acceptable economic and financial impacts on Medfield residents and Town services**, assuring that the Master Plan is in the Town’s economic best interests.
- **Address Town housing needs**, which may include smaller-footprint housing that is affordable for Medfield residents who are downsizing and would like to stay in the area, or any housing that brings more diversity into Medfield’s housing stock in alignment with the Town’s Housing Production Plan.



- **Maintain and enhance the character and value of the Town of Medfield and its residents**, including the site’s scenic and natural features, spaces for passive and active recreation, and the site’s historic, agricultural, and architectural significance.

For more information regarding the Master Plan including extensive community input, please refer to the following documents which may be downloaded from the Town of Medfield Master Plan [Webpage](#):

- [Executive Summary](#)
- [Medfield State Hospital Strategic Reuse Master Plan](#)
- [Map of the Preferred Scenario](#)
- [Appendix](#)
- [Draft MSH District Zoning](#)
- [Site Survey](#)

PREFERRED REDEVELOPMENT SCENARIO

Section VIII of the Master Plan describes a preferred redevelopment scenario that embraces Medfield’s priorities of redevelopment while respecting various legal agreements the Town has entered into with the Commonwealth of Massachusetts, the Massachusetts Historical Commission, and the Massachusetts Department of Agricultural Resources. The preferred redevelopment scenario:

- Preserves and rehabilitates as many historic buildings as is financially feasible, retaining the site’s historic architectural character and the historic landscape of MSHI while updating for ADA accessibility and allowing for some selected demolition of non-contributing buildings;
- Provides a diversity of housing opportunities for seniors and for persons of all ages and incomes while advancing the Town’s housing production goals;
- Uses a mixed-use approach to redevelopment by creating new commercial spaces for businesses, offices and shared work space on the core campus, featuring space for a café and a restaurant that can showcase local foods with farm to table offerings;
- Embraces the importance of health, fitness, sports and recreation for all and provides a site for a new parks and recreation facility;
- Maintains and creates spaces and trails for walking, dog walking, hiking, horseback riding riverfront access, enjoying the outdoors and appreciating the incredible vistas overlooking the Charles River;
- Creates a cultural center to be a destination and focal point involving and serving the entire Medfield community;
- Connects with agriculture and provides opportunities for community gardens and nature education; and,
- Dedicates over half the land to open space and agriculture.

The preferred redevelopment scenario described in the Master Plan suggests the rehabilitation of 28 historic buildings and construction of 16 new buildings encompassing 661,000 SF, provides for development of 191,000 SF of new commercial space and a 26,000 SF cultural center, and preserves 76 acres of open space for trails, walking paths, and agriculture while reserving up to 12 acres for a public parks and a recreation facility and other appropriate commercial/agricultural use south of Hospital Road. The housing plan envisions up to 334 units including market-rate, affordable, senior, and other uses with some for-sale units as well as rental housing, assisted living, live-work, and special needs housing. The land north of Hospital Road is currently zoned Business-Industrial and the land south of Hospital Road is currently zoned as Agricultural. Prior to the issuance of an RFQ or RFP, it is anticipated that necessary zoning changes will be made to support the proposed uses described in the Master Plan. The draft zoning by-law for the redevelopment of Medfield State Hospital is hyperlinked on Page 2 of this RFI.



FOCUS AREAS

For purposes of discussing the preferred redevelopment scenario as well as architectural, design, and other considerations, the Master Plan divides the site into the eight focus areas below:

- The Green
 - Vision: Rehabilitation and expansion of the grassy area to retain the bucolic vista from Hospital Road (Hospital Farm Historic District)
 - Possible setting for special events, natural amphitheater
- The Core Campus
 - Vision: Active center of the redevelopment. Mixed use, including residential community with food, gathering places, services, arts and culture.
 - Historic rehabilitation, mix of residential unit types and affordability, including housing for millennials, senior housing, and a possible continuing care retirement community with independent living or assisted living.
 - Includes supporting commercial uses, offices, café, restaurant and cultural uses
- The Arboretum
 - Vision: Adjacent residential housing set on a site that preserves the historic treescape while offering more modern housing. Historic rehabilitation of the Superintendent's house with additional new construction of accessible homes
 - Preservation of tree collection identified as making up the "Arboretum".
- Water Tower Area (not developable)
 - Vision: Continued use as water supply tower in accordance with agreements the Town has with the Commonwealth.
 - Parking and community gardens
- North Field
 - Vision: Agriculture and public access
 - Demolition of existing buildings
 - Possible future residential use (long-term site for future use maintained for the time being as open fields, potentially available for haying or other similar uses)
- West Slope
 - Vision: Primary area projected for commercial use
 - Public, residential, and commercial uses (e.g. welcome center, management office, inn with restaurant and fitness center)
 - Maintain viewshed of Charles River Gateway
- The South Field
 - Vision: Municipal Recreation, Agriculture
 - Possible recreation facility
 - Possible commercial agriculture facility
 - Possible leasing of fields for agriculture
- Sledding Hill
 - Vision: Maintain winter sledding activities in accordance with clear preferences voiced by Town residents
 - Agriculture (haying) in summer

