

TOWN OF OTIS
SELECTBOARD
TOWN HALL
1 North Main Road
Otis, MA 01253
413-269-0100 x127

**INVITATION FOR BIDS
(IFB #26-06)
FOR
Planning Board
Master Plan Update**



TOWN OF OTIS

Bid # 26-06

Master Plan Update
RFP PACKET CHECKLIST

Feb 02, 2026

DOCUMENTS COMPRISING THE BID PACKET:

(Please be sure that you have received all these documents before submitting your bid.)

- Request for Proposals**
- Copy of Legal Advertisement**
- Scope of Services**
- Certificate of Non-Collusion**
- Certificate of Tax Compliance**
- Acknowledgement Form for Addendum (if any)**

TO BE SUBMITTED WITH THE SEALED BID:

- Signed copy of Proposal**
- Sealed Price Proposal**
- Scope of Services**
- List of References**
- Signed copy of Non-collusion Statement**
- Signed copy of Tax compliance**
- Certificate of Insurance**
- Signed Acknowledgement of Addendum(s) – if applicable**

The public proposal opening is at 2:00 P.M. on Wednesday February 18, 2026 in the Conference Room at the Otis Town Hall 1 North Main Road, Otis, Massachusetts 01253.

REQUEST FOR PROPOSALS

The Town of Otis seeks sealed proposals for technical assistance with updating its 2016 Master Plan. Proposals must be clearly marked on the outside envelope "Master Plan Update 26-06" and are due to the Select Board's office at 1 North Main Road, Otis MA 01253 on or before Wednesday February 18, 2026 at 2:00 pm. Proposals will be publicly opened at that time at the above address. Each submission should include 1 original and 3 copies. Price proposals must be submitted in a separate sealed envelope clearly marked "Sealed Price Proposal, Master Plan Update 26-06".

Late submissions will not be accepted. Responses submitted by facsimile or other electronic means will also not be accepted. This update is funded through a Community Planning Grant with the Executive Office of Housing & Livable Communities. Project budget is \$70,000.

The full RFP packet can be requested by emailing townadmin@townofotisma.com. Questions may be directed to townadmin@townofotisma.com no later than five days before opening date. The Board of Selectmen reserve the right to waive any informality or to accept or reject any or all proposals deemed to be in the best interest of the Town.

LEGAL NOTICE

The Town of Otis seeks sealed proposals for technical assistance with updating its 2016 Master Plan. Proposals must be clearly marked on the outside envelope "Master Plan Update 26-06" and are due to the Select Board's office at 1 North Main Road, Otis MA 01253 on or before Wednesday February 18, 2026 at 2:00 pm. Proposals will be publicly opened at that time at the above address. Each submission should include 1 original and 3 copies. Price proposals must be submitted in a separate sealed envelope clearly marked "Sealed Price Proposal, Master Plan Update 26-06". This update is funded through a Community Planning Grant with the Executive Office of Housing & Livable Communities. Project budget is \$70,000. The full RFP packet can be requested by emailing townadmin@townofotisma.com. Questions may be directed to townadmin@townofotisma.com no later than five days before opening date. The Board of Selectmen reserve the right to waive any informality or to accept or reject any or all proposals deemed to be in the best interest of the Town.

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal 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 individual submitting bid or proposal

Name of business

TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. c. 62C, §49A, I certify under the 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.

Signature of person submitting bid or proposal

Name of business

ADDENDUM ACKNOWLEDGEMENT

I hereby acknowledge that we received addendum #(s) _____ and are fully aware of the information included.

AUTHORIZED SIGNATURE

NAME OF PERSON SIGNING BID OR PROPOSAL

TITLE

NAME OF BUSINESS

DATE

Scope of Services

The Town of Otis has issued this Request for Proposals (RFP) to select a qualified consultant for assistance in updating the Town's 2016 Master Plan. The goal is to develop an update to the plan that responds to current challenges and opportunities while reflecting the community's evolving needs, values, and vision. The consultant will develop and produce an executive summary that can be used as a separate document from the Master Plan to outline key metrics and results of the Master Planning process. Develop and produce visual/graphics to assist in conveying the consensus-based vision and associated action items. These visuals/graphics should be able to serve as stand-alone exhibits.

It is envisioned that the consultant will prepare a draft, final plan and executive summary that are readable by the layperson and not be overly technical or contain a lot of jargon. Draft sections of the plan will be reviewed and approved by the Master Plan Steering Committee

The selected consultant will work closely with the Town to prioritize components of the Plan and to define an approach that is both responsive and flexible. The Master Plan Steering Committee, with support from the consultant, will play a central role in defining the methods for public involvement to ensure broad and inclusive input in shaping the Town's vision for the next decade. The Committee will consist of municipal stakeholders, members from Boards and Commissions, and other relevant stakeholders. The project is structured into four core parts, each designed to emphasize our priorities, leverage local knowledge and expertise, and promote inclusive public participation-while ensuring compliance with MGL Chapter 41, Section 81D.

Part 1 - Data and Document Review

The consultant will conduct a comprehensive inventory and review of existing plans, studies, and reports completed since the 2016 Master Plan to establish baseline conditions, assess progress, and identify emerging issues and trends relevant to both short- and long-term planning efforts.

Part 2 - Reaffirming and Updating the Community Vision, Goals, and Policies

The public engagement process will begin by revisiting the original vision statement, goals, and policies. This will involve:

- Evaluating which goals and strategies have been achieved.
- Determining which components remain relevant and effective.
- Identifying where updates or new directions are needed to reflect Otis's current realities and aspirations.

Part 3 - Development of Plan Elements

A. Land Use and Development Patterns

- Inventory and analysis of current land uses, including changes and zoning and environmental constraints.
- Evaluation of trends and the balance among residential, commercial, industrial, agricultural, and open space uses.
- Recommendations for future land use patterns, including zoning adjustments and development standards that support climate resiliency and sustainability.

B. Housing- Quality & Affordability

- Analysis of existing housing stock (type, age, condition, location, cost).
- Assessment of housing needs based on demographic and economic projections.
- Policy recommendations to support diverse, affordable, and equitable housing options, including for seniors, low-income residents, and individuals with special needs.

C. Economic and Cultural Development / Historic and Cultural Resources

- Analysis of our current economic condition, growth opportunities, and development incentives.
- Inventory of historic and cultural assets and their roles in the community.
- Strategies to protect and enhance these assets through bylaws, programs, and public-private partnerships.

D. Public Facilities and Services

- Inventory of infrastructure and municipal services including schools, water and sewer systems, public safety, municipal buildings, and community amenities.
- Identification of current and future service needs and facility deficiencies.
- Recommendations for infrastructure upgrades, capital planning, and service delivery improvements.
- Evaluation of existing roads and conditions.
- Identification of deficiencies and safety issues.
- Development of strategies to improve access, recommendations for upgrades and promote alternative transportation.

E. Natural Resources

- Inventory of our natural assets (open space, waterways, forests, wetlands, wildlife habitats, etc.).
- Identification of threats to natural resources and recommendations for protective measures, including land use regulations and conservation policies.

F. Sustainability and Climate Resiliency

- Integration of policies and practices that promote environmental sustainability, climate adaptation, energy efficiency, and community health and resilience.

Part 4 - Public Participation

The proposal shall include a detailed approach for public involvement throughout the Master Plan update process. Public participation is a core component of this initiative, and the Town is committed to ensuring the process is inclusive, transparent, and representative of our diverse community.

Consultants must outline proposed engagement tools and techniques to be used in gathering meaningful input and fostering broad participation. This includes strategies for reaching a broad sampling of the population and ensuring accessibility in all engagement efforts.

At a minimum, we anticipate the following opportunities for public engagement:

- **Town wide Community Survey** - A broad-based survey to assess resident priorities, perceptions, and suggestions.
- **Master Plan Committee** - Regularly scheduled working sessions to guide development of the Plan and provide technical and community-based insights.
- **Community-Wide Public Meetings** -Inclusive forums open to all residents for feedback at key stages of the planning process, including an introductory meeting to initiate the planning process and a review of the draft implementation plan before it is adopted.

Additional engagement strategies such as pop-up events, youth outreach, virtual meetings, multilingual materials, or interactive web tools are encouraged and should be detailed in the proposal.

Part 5 - Development of Implementation Plan

This section of the Master Plan will translate vision and policy into action. The

implementation plan must clearly identify the steps we must take to achieve the Plan's goals, assign responsibilities to relevant departments and agencies, and outline the sequencing of initiatives based on urgency, feasibility, and available resources.

The implementation plan shall include:

- **Action Matrix** - A prioritized, phased list of recommended programs, policies, and initiatives. Each action item must identify:
 - The lead agency or department responsible.
 - Estimated timeline for implementation.
 - Required resources or funding mechanisms.
 - Dependencies or related actions.
- **Best Practices and Model Tools** - For high-priority initiatives, the consultant shall provide examples of implementation tools, such as sample zoning ordinances, design guidelines, program frameworks, or administrative policies used successfully in other comparable municipalities.
- **Fiscal Impact Analysis** -An analysis of the fiscal implications of major land use recommendations and policies, including projected impacts on municipal budgets, service delivery costs, and revenue streams.

The implementation plan must be realistic, actionable, and designed to support ongoing monitoring and adaptation as conditions evolve.

Comparative Criteria

All proposals meeting the above Minimum Evaluation Criteria will be forwarded to the review committee for comparative evaluation. Proposals shall be rated according to the following Comparative Evaluation Criteria.

1. **Experience and past performance** - The consultant must submit a list and descriptions of past projects and must demonstrate that he/she has successfully completed at least six comprehensive or master plans, or comparable projects within the prior five years. The consultant shall also demonstrate their ability to complete projects within established schedules.

HIGHLY ADVANTAGEOUS - Proposer has submitted 15 or more past projects that they have successfully completed.

ADVANTAGEOUS - Proposer has submitted at least 10, but less than 15 past projects that they have successfully completed.

NOT ADVANTAGEOUS - Proposer has submitted at least 8, but less than 10 past projects that they have successfully completed.

UNACCEPTABLE - Proposer has submitted at least 6, but less than 8 past projects that they have successfully completed.

2. **Qualifications of key staff** - The consultant shall provide resumes for all key personnel to be involved in this project. For all personnel who will participate, the consultant shall indicate previous relevant project assignments, the number of years during which they have performed comprehensive/master plan development services, and their areas of expertise.

HIGHLY ADVANTAGEOUS - Proposer's key personnel on this project have 10 or more years' experience in projects of similar scope and size.

ADVANTAGEOUS - Proposer's key personnel on this project have at least 8, but less than 10 years' experience in projects of similar scope and size.

NOT ADVANTAGEOUS-Proposer's key personnel on this project have at least 5, but less than 8 years' experience in projects of similar scope and size.

UNACCEPTABLE - Proposer's key personnel has less than 5 years' experience in projects of similar scope and size.

3. **Public Involvement/Citizen Participation Experience** - Consultant's experience in using innovative techniques to maximize citizen participation and public involvement. Specific attention will be given to the consultant's experience with public involvement in master planning processes.

HIGHLY ADVANTAGEOUS - Proposer has at 10 or more years' experience working with public involvement/citizen participation projects.

ADVANTAGEOUS - Proposer has at least 8, but less than 10 years' experience working with public involvement/citizen participation projects.

NOT ADVANTAGEOUS - Proposer has at least 5, but less than 8 years' experience working with public involvement/citizen participation projects.

UNACCEPTABLE-Proposer has less than 5 years' experience working with public involvement/citizen participation projects.

4. **Technical proposal**- The Town shall determine whether the proposal meets the scope of services set forth in this document and how well the proposal addresses the needs and circumstances of Otis. In conducting this assessment, particular attention will be given to how well the consultant understands the challenges facing Otis, how much familiarity the consultant has with the Town of Otis and to the specifics of the consultant's approach for conducting this work, including proposed means for eliciting input from the residents, setting the plan vision, goals and policies, defining implementation actions and establishing implementation schedules, and priority-setting techniques.

HIGHLY ADVANTAGEOUS -Proposer has a documented understanding of what challenges the Town of Otis has. Their approach to eliciting input from the residents is sound and they have documented proof of participation percentages from other projects utilizing this approach.

ADVANTAGEOUS - Proposer has an understanding of what challenges the Town of Otis has. Their approach to eliciting input from the residents is sound and they have documented proof of participation percentages from other projects utilizing this approach.

NOT ADVANTAGEOUS - Proposer has an understanding of what challenges the Town of Otis faces. Their approach to eliciting input from the residents is sound.

UNACCEPTABLE- Proposer has no understanding of what the challenges the Town of Otis faces.

Proposal Ranking/Rule for Award

The review committee will evaluate technical proposals without knowledge of the price proposals. Once the evaluation of the technical proposals is complete, price proposals will be opened and reviewed by the committee.

The contract shall be awarded to the responsible and responsive proposer submitting the most advantageous proposal, taking into consideration all evaluation criteria as well as price.

The Committee will rank the proposals received in the following categories:

Highly Advantageous, Advantageous, Not Advantageous, and Not Acceptable The contract will be awarded within thirty (30) days after the proposal opening.

Work under this contract is expected to begin immediately and be completed on or before June 30, 2027.