

CHITTENDEN COUNTY REGIONAL PLANNING COMMISSION  
REQUEST FOR PROPOSALS  
for  
PLANNING & ZONING CONSULTANT SERVICES for the TOWN OF MILTON  
Deadline: 3:00 pm, Friday, March 24, 2023

**I. Introduction**

The Chittenden County Regional Planning Commission (CCRPC), on behalf of the Town of Milton, is requesting proposals for consultant services to assist with the development of a Downtown Core Master Plan. CCRPC is providing administrative and project management functions to assist the Town of Milton. The selected consultant will enter into a contract with CCRPC. Completion of the Downtown Core Master Plan is intended to support future amendments to the Milton Unified Development Regulations (UDRs).

**II. Project Schedule**

February 22, 2023	RFP Released
March 15, 2023 at 3 pm	Deadline for submission of questions via email
March 17, 2023	Response to questions distributed to firms
<b>March 24, 2023 at 3 pm</b>	<b>Deadline for submission of proposal via email</b>
April 7, 2023 (9 am - 3 pm)	Consultant Interviews (if needed)
April 14, 2023	Consultant Selected
May 2, 2023	Contract Execution
December 31, 2023	Project Completion

Questions about this RFP or the project may be sent via email to Taylor Newton, CCRPC Planning Program Manager at (802) 846-4490 (x115) or [tnewton@ccrpcvt.org](mailto:tnewton@ccrpcvt.org).

**III. Project Purpose**

In late 2021 and early 2022, the [Town of Milton](#) collaborated with the [Vermont Council on Rural Development \(VCRD\)](#) to conduct a Community Visit. According to VCRD, the Community Visit program is a way for “towns to engage and bring together their residents, set common goals and directions in a neutral and facilitated structure, and access resources that will help them take action on those goals.” Milton’s Community Visit resulted in the community selecting three important local priorities. One of those priorities is to “Develop a Downtown Core for Milton.” Specifically, the [Milton Community Visit Report](#) set a goal to:

*Form a task force to develop and implement a plan to create a central, walkable, and accessible downtown area for Milton. The group could draw from past initiatives and partner with regional and state experts to create a path towards an inviting and vibrant downtown core. The area could include a town green and walkable businesses and*

*amenities that would serve both local residents and attract visitors. A task force could work to identify public investment opportunities as well as private investors and developers to help execute the community’s vision over time. (p.6).*

The Milton Downtown Core project is meant to implement this priority through a cooperative project between the Town of Milton, a local citizens group created during the VCRD Community Visit (Milton on the Move) and CCRPC. The Downtown Core is roughly defined as the DB1 Zoning District and the surrounding neighborhoods (see Figure 3). It is anticipated that the Downtown Core Master Plan project will be followed by another separately funded project to revise the Milton Unified Development Regulations in the DB1 District and surrounding zoning districts.

Milton has conducted several projects over the past 20 plus years related to planning and regulating development in its Downtown Core. There has been some progress and positive work completed to support the original vision expressed in past planning documents. This includes significant public investment in infrastructure (e.g. water, sewer, sidewalks), residential development ([Elm Place Senior Housing](#), [Haydenberry Commons](#)), and some commercial development. However, the development in this area still lacks the “downtown” feeling desired by Milton residents as expressed in past planning efforts and as a part of the VCRD Community Visit. The Town seeks to develop a Downtown Core Master Plan to better understand how to create a true downtown core that provides a variety of housing choices and a comfortable environment for all travel modes.

#### **IV. Local Context**

Milton is one of the most populous and fastest growing municipalities in Vermont. Historically, development in Milton took place in what is now its state-designated Village Center located near the Lamoille River dam and the intersection of Main Street and U.S. Route 7 (River Street). Since the 1960’s, Milton has grown from a small New England village surrounded by working farms to a suburban hub containing a broad mix of residential, commercial, and industrial uses. Throughout this period of community evolution, Milton has used its planning process and development regulations to address the impacts from population growth, economic transformation, and land use changes.

<b>Date Incorporated:</b> June 8, 1763
<b>Total Area:</b> 51.4 Square Miles
<b>Population:</b> 10,723 (2020 census)
<b>Population Change since 2000:</b> +13.1%
<b>Population Change since 2010:</b> +3.58%
<b>Form of Government:</b> Selectboard/Manager

*Figure 1 - Milton - Quick Facts*

In 2000, the Town conducted a public process and planning project which led to the development of the original Town Core Master Plan. The Town Core (now referred to as the Downtown Core) is located south of the historic village between US Route 7 and Middle Road. The Town Core Master Plan reflected Town’s residents desire for a downtown with higher densities and mixed-uses. As a result of this plan, the Town made major changes to its

development regulations in 2001. Densities were increased, height limitations were relaxed, and a mix of uses were allowed.

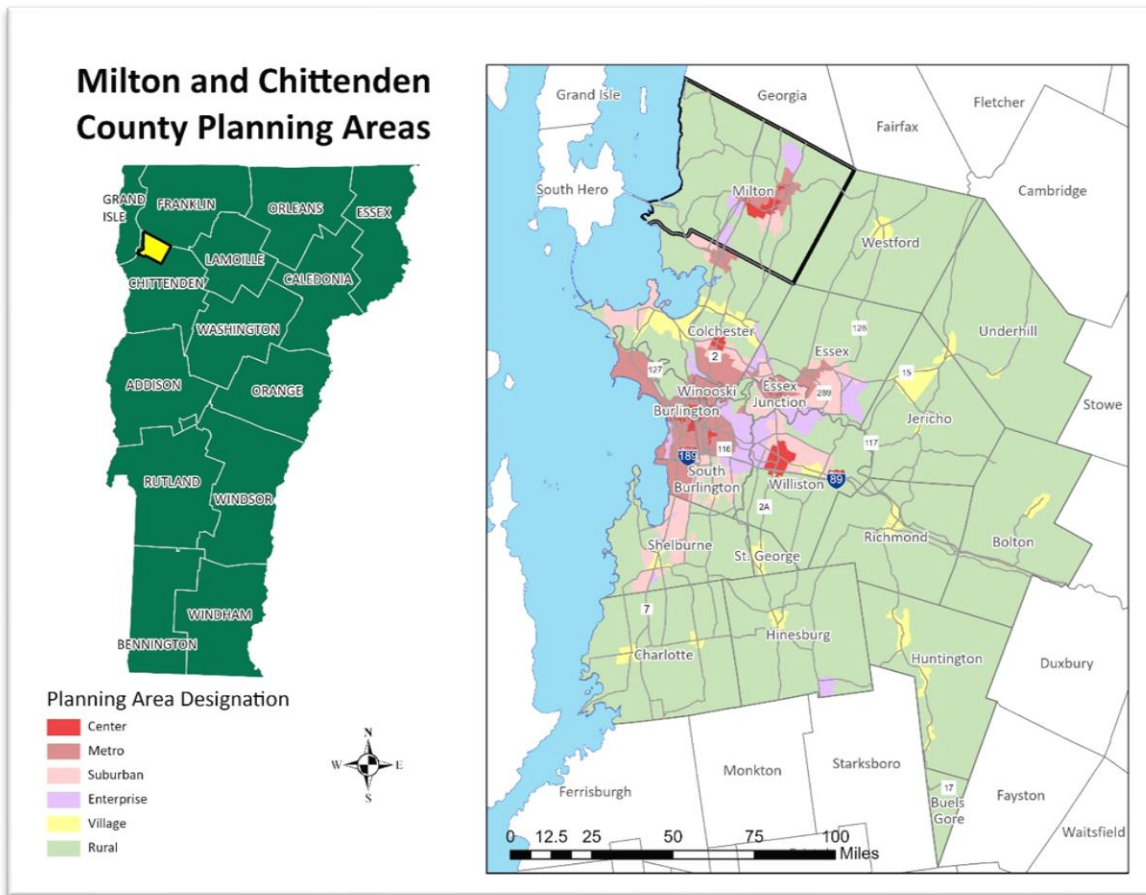


Figure 2 - Location Map

In 2005, the Town established the “Downtown Business District” (DB1 District) in a portion of the Downtown Core. The intent of this change was to limit residential growth from outpacing commercial growth in the heart of the new downtown.

Over the past 20 years, the Town invested in substantial infrastructure improvements (water, sewer, and sidewalks) to facilitate downtown development. The Town utilized tax increment financing (TIF) to fund construction of this infrastructure. Many key municipal properties (Town Offices, Town Library, Fire and Rescue Building, Bombardier Park) and other important community assets (e.g. Kinney Drugs, Hannaford’s Supermarket, Timberlane Pediatrics, UVMHC Family Medicine) are located in the Downtown Core or within close proximity (e.g. Milton High School). The Town is cooperating with the Vermont Agency of Transportation (VTrans) to reconfigure the [intersection of US 7/Middle Road/Railroad Street](#) to address traffic safety concerns in the next few years. The Downtown Core is also served by the [Milton Commuter](#) public transit route which connects Milton to Burlington.

The Downtown Core also has some challenges. The major road through the Downtown Core, US Route 7, is a State Highway and is controlled by VTrans, which limits the Town's options to coordinate the streetscape with nearby development. VTrans recently conducted an extensive study of the [US Route 7 Corridor](#) in Milton which identified vehicular safety, congestion management, stormwater management, and bicycle / pedestrian facilities as major needs for improvement and investment in and around the Downtown Core. The Downtown Core, including Route 7, lacks a municipal stormwater treatment facility and most stormwater is treated via sheet flow and infiltration.

Overall, Milton's regulatory approach and infrastructure investments within its Downtown Core has led to mixed results in terms of accomplishing the goals of the 2000 Town Core Master Plan. There has been limited commercial growth in the Downtown Core in the past decade. Much of this growth has been one-story buildings with substantial parking. To date, only a few mixed-use buildings have been built in Milton. No multi-story mixed use buildings have been constructed in the DB1 District.

#### **V. Scope of Services:**

The following scope of services will result in the development of the Milton Downtown Core Master Plan:

##### **1. Site Analysis**

- a. **Interviews.** The Consultant will interview identified stakeholders involved with the project. These interviews will include groups and individuals including elected officials, nonprofit organization leaders (including Milton on the Move), property owners, neighborhood representatives, local design professionals, developers, business organizations, and municipal staff.
- b. **Site Analysis.** The Consultant will become familiar with the physical details of the Downtown Core, the historic patterns of development in the area, and previous planning efforts and community preferences expressed for its continuing redevelopment. Past studies include: [Town Core Master Plan \(2000\)](#), [A Town Core Streetscape and Accessibility Design Study \(2007\)](#), [Milton Route 7 Land Use and Transportation Study \(2008\)](#), [US Route 7 – Milton to Georgia Corridor Study](#), and [Vermont Council for Rural Development Community Visit Report \(2022\)](#). As a part of this process the Consultant will specifically define the geographic limits of the study area.
- c. **Website.** The Consultant will develop and maintain a project website with an identifiable project name and brand. The website will have the opportunities to observe and interact with project materials (e.g. photographs, maps, renderings, and other images). The website should also describe the Consultant's credentials and explain the project's timeline and process.

## 2. Design Workshop

- a. **Design Workshop and Engagement.** The Consultant will work with the Town, Milton on the Move, and CCRPC to build and implement a public engagement strategy that provides a variety of mechanisms for engagement. The public engagement strategy will be designed to reach a diverse set of residents and stakeholders including those typically under-represented in the planning process including folks that rent their home. The public engagement strategy should include a mix of both live and “at-your-own-pace” methods. The Consultant may need to include virtual and asynchronous methods of engagement.

As part of the effort the Consultant will organize and lead design workshops (or a full planning charrette or similar processes), to engage the community, gather ideas and goals, and formulate implementation strategies. The Consultant will tailor the workshop to maximize community input. While the focus of engagement may be on building form and architectural standards, the Consultant shall ensure that the public engagement process will also include discussions of alternatives for street design and strategies to create a vibrant downtown surrounded by livable neighborhoods with a variety of housing types in a walkable environment. The workshop will take into consideration the findings of the initial site analysis, input from staff, and information obtained at previous meetings, workshops, interviews and previous planning efforts. The design workshop will ideally occur as an in-person event or series of events. Public engagement will directly inform the draft Master Plan.

## 3. Master Plan

The Consultant will develop a Downtown Core Master Plan composed of the following elements:

- a. **Downtown Core Conceptual Plan.** A conceptual plan for the redevelopment of the Downtown Core based on the site analysis and design workshop. The conceptual plan will show a build out of the entire study area and will specifically incorporate information about prospective building locations, street design, public spaces, and landscaping.
- b. **Conceptual Street Sections.** Conceptual street standards that define design attributes and geometries that balance the needs of motorists, pedestrians, bicyclists, and transit riders while promoting a vibrant public realm. These conceptual standards should include design specifications for sidewalks, travel lane widths, parking, trees, ADA accessibility, stormwater management, and lighting.
- c. **Conceptual Plan Build Out - Visualizations.** Four or more three-dimensional visualizations/graphics meant to illustrate the vision for the Downtown Core as shown on the conceptual plan.

- d. **Recommendations For Future Regulatory And Non-Regulatory Implementation.** A list of recommended regulatory and non-regulatory implementation actions to implement the conceptual plan.

4. **Final Presentation.** The Consultant will present the draft Master Plan to the Milton Selectboard and Planning Commission. The final presentation may include providing education about form-based code, if desired by the Town. The Consultant will complete any final edits to the Master Plan in response to direction provided by the Selectboard and Planning Commission at this meeting.

## **VI. Proposal Submission Requirements**

Each proposal shall include two documents: a Technical Proposal and a Cost Proposal.

A Technical Proposal and Cost Proposal (see Section VII) shall be submitted as two separate email attachments to [tnewton@ccrpcvt.org](mailto:tnewton@ccrpcvt.org). Technical Proposals will be reviewed by an evaluation committee prior to opening any Cost Proposal. Proposals shall be submitted in Adobe Portable Document Format (PDF) file **must be received on/before 3 pm on March 24, 2023. Emailed proposals are required.** Digital proposals exceeding 7 MB must be compressed below 7 MB or sent via Dropbox. Applicants are encouraged to submit proposals early in case there are technology issues. CCRPC is not responsible for proposals that are not received due to technology issues.

No phone calls please. All information received in response to this RFP that is marked Proprietary will be handled accordingly. Responses to the RFP will not be returned.

## **VII. Proposal Format**

The Technical Proposal should demonstrate that the Consultant understands the intent and scope of the project, the content of the deliverables, and the specific tasks that must be performed in the course of supplying these services. In order to assist in the evaluation process, please include the following information in the technical proposal:

1. **Description of Approach:** Up to two pages describing the Consultant's typical approach to similar projects and a detailed description of the methodology proposed for this particular project. Also, include information about possible approaches to the public process and public engagement.
2. **Work Program:** Confirmation that the consultant can provide the scope of services outlined in Section V accompanied by a detailed work program including:
  - a. Tasks to be performed.
  - b. When each will be completed (timeline).
  - c. Tentative allocation of person days by task.
  - d. Schedule of work products.

3. **Project Management and Communication:** Methods the Consultant proposes to use to manage the project and communicate with the Town of Milton, CCRPC, and the public as to project progress, reviews, and conduct of public meetings.
4. **Team Expertise:** A brief description of general qualifications, the multi-disciplinary nature of the team assembled for this project, specific evidence of relevant experience creating form-based codes, and a listing of key personnel, their resumes and their specific roles on this project. The Town of Milton and CCRPC will accept proposals from teams of consultants representing multiple firms.
5. **Comparable Projects:** Summary of at least two design charette/master plan projects in progress or completed, with the following information for each:
  - a. Reference with current contact information
  - b. Nature of public involvement in development of master plan
  - c. Client type (clarifying role of private sector client, if any)
  - d. Size and scale of geographic area
  - e. Did the master plan result in code/development regulation revisions?
6. **Sample Master Plan Document:** Please include one or more sample master plan documents (or link to master plan documents). If the master plan resulted in the adoption of a revised development regulations (or form-based code), please provide a link to the document. Photos of designed or built results of the revised development regulations are encouraged but must be accompanied by a description of their specific relationship to the revised regulations and/or form-based coding process.
7. **Data Needed:** A list of data needed by the Consultant to complete the project that will need to be provided by Town of Milton and CCRPC.

Please provide a separate Cost Proposal (separate from the Technical Proposal). The Cost Proposal shall include the following, listing sub-consultants separately:

1. **Cost Proposal:**
  - a. Hourly rate schedule
  - b. Overhead rate and fee
  - c. Hours and cost by task/deliverable
  - d. Submit a completed copy of the [Contractor Financial Background Questionnaire](#)

#### **VIII. Proposal Evaluation:**

All proposals will be reviewed and evaluated by a Review Committee consisting of CCRPC, Town of Milton staff, Milton Planning Commission members, Milton Selectboard members, and at least one member of Milton on the Move. All proposals shall adhere to the Additional Consultant Requirements (see Section X).

All Technical Proposals will be evaluated against Scope of Services in Section V in an initial review process. Proposals that fail to comply with the requirements of Section V may be rejected and not considered further in the evaluation process.

1. **Technical Proposals.** Technical Proposals are assigned scores across six equally weighted categories:
  - a. Responsiveness to the scope of work
  - b. Experience in preparing master plans and development regulations/form-based codes that regulate development and redevelopment in other communities similar to Milton and experience in identifying, evaluating, codifying, and explaining the essential qualities of community design and character
  - c. Experience in equitable engagement and building community consensus to support innovative planning and/or regulatory structures
  - d. Strong graphic skills
  - e. Strong communication skills (written and oral)
  - f. Commitment to including a disadvantaged business enterprise (DBE) on the Consultant team
2. **Cost Proposals.** Once the technical proposal review is complete and scored, the Cost Proposal information will be reviewed by the committee for consistency with, and in light of, the evaluation of the technical proposal. The proposed project cost will be a consideration in the selection. Specific attention will be given to the commitment implied for key staff and the overall labor effort proposed, and their relationship to the estimated project cost.
3. **Interviews.** CCRPC and the Town of Milton reserve the right to select and invite the top scoring consultants for optional interviews prior to awarding the contract. In this process, the review committee may ask the respondents to give an oral presentation of their respective proposals. The purpose of this oral presentation is to provide an in-depth analysis of certain qualifications, experience in performing similar services, and an opportunity for the Consultants to clarify or elaborate on their qualifications without restating the proposal to the review committee. The optional interview and presentation, if deemed necessary by the review committee, will be held via Zoom or another digital meeting platform. Interviews will be held on **April 7, 2023 between 9 am - 3 pm (EST).**

All submitted proposals become the property of the Town of Milton and CCRPC upon submission. The cost of preparing, submitting, and presenting is the sole expense of the Consultant. The Town of Milton and CCRPC reserves the right to reject any and all proposals received as a result of this solicitation, to waive any formality and any technicalities or to cancel this RFP in part or in its entirety if it is in the best interests of the Town of Milton and CCRPC. This RFP in no way obligates the Town of Milton and CCRPC to award a contract.



All proposals will become a public record. If a proposal does include any material that is considered to be proprietary and confidential under [1 VSA Chapter 5](#), the proposal shall clearly designate the material as confidential and the proposal shall explain why such material should be considered confidential. Under no circumstances can the entire response or cost proposal be marked confidential. Proposals so marked shall not be considered.

**IX. Estimated Cost:**

The budget for this project is \$50,000 in total; \$40,000 from Federal Highway PL Funds and \$10,000 from the Town of Milton.

**X. Additional Consultant Requirements:**

1. **Registration.** The Consultant awarded this contract shall, upon notification of award, apply for registration with Vermont Secretary of State's office to do business in the State of Vermont, if not already so registered. The registration form may be obtained from the Vermont Secretary of State, 109 State St. Montpelier, VT 05609-1104. The fee is \$20.00. The Telephone number is (802) 828-2386. The contract will not be executed until the Consultant is registered with the Secretary of State's office. The successful Consultant will be expected to execute sub-agreements for each sub-consultant named in the proposal upon award of this contract.
2. **Public Participation Plan.** The CCRPC adheres to the Public Participation Plan (2014) for all its activities. It is available on the [CCRPC website](#). The Plan outlines the CCRPC's principles and goals, aligns our strategies and activities with specific levels of engagement, and provides evaluation methods for determining the effectiveness of our initiatives.

Within the Public Participation Plan the Spectrum of Participation divides the CCRPC's strategies into corresponding levels of engagement to ensure the community's needs are being met. Every project is reviewed using the CCRPC Public Participation Plan & Equity Impact Worksheet to determine at an early stage whether there are groups that need additional engagement and further review of equity impacts. The selected consultant will work with the CCRPC and the Town of Milton staff to complete the Public Participation Plan Worksheet and refine the public participation task in the scope of services.

3. **Disadvantaged Business Enterprises, Non-Discrimination, and Title VI.** The Consultant shall comply with [VTrans DBE Policy Requirements](#) as outlined in Section 203.07 of the Specifications for Consultant Services. These requirements outline the State's and the Consultant's responsibility with regard to the utilization of Disadvantaged Business Enterprises (DBE) for the work covered in the RFP. Copies of the VTrans current DBE Registry are available upon request from VTrans. Consultants shall make good faith efforts to solicit DBE subconsultants.

The Consultant shall comply with the provisions of the Title VI of the Civil Rights Act of 1964, the Civil Rights Restoration Act of 1987, and subsequent related acts, and all other federal statutory laws which provide in whole or in part that no person or entity on the grounds of race, color, national origin, sex, physical disability, or veteran status be excluded from participation in, be denied the benefits of, or be otherwise discriminated under the State, federal and USDOT assisted contracts, programs and activities. The Consultant shall further certify that it will comply with the provisions of the Americans with Disabilities Act.

4. **Invoicing.** A contract entered into as a result of this RFP will be a deliverable-based contract. The CCRPC will undertake negotiations with the lead firm/proposer that emerges through the evaluation process. Invoices should be submitted at the successful completion of each task and acceptance of the deliverable by the CCRPC Project Manager. If a monthly payment schedule has been agreed upon, the consultant shall submit detailed project status report on the first of each month to the CCRPC Project Manager indicating the percent completion for each project task. The CCRPC Project Manager reserves the right to request supplemental information to ensure appropriate project progress.
5. **Other Contract Provisions.** Prior to beginning any work, the Consultant shall obtain Insurance Coverage in accordance with the [Standard Contract Provisions](#). Note that references in these provisions to “Municipality” should be considered as referring to the CCRPC. The certificate of insurance coverage shall be documented on forms acceptable to the CCRPC.

All digital data produced as a result of the project shall be provided to the Town of Milton and CCRPC. Digital data includes spatial and tabular data attributes (GIS shapefiles/geodatabases) and documentation files. All digital data must meet the [Vermont Zoning Data Standard](#), and all products should be documented using the [VGIS metadata standard \(metadata template\)](#). All data developed in CAD shall be converted to a GIS shapefile in the correct coordinate system. Spatial Data will be provided electronically in Vermont State Plane Meters Coordinates, NAD 83 (or the current coordinate and datum set by VGIS) with its metadata.

