**Project Description**

The Town of Brookline, Massachusetts is seeking proposals from qualified consultants to assist in the development of a comprehensive Climate Action and Resiliency Plan (CARP), building upon the foundation of the Town’s 2018 Climate Action Plan and 2023 Hazard Mitigation Plan~~,~~ with the goal of addressing current and future climate challenges. Brookline has a twenty-year history of taking steps toward improving the sustainability and resiliency of its community; however, there is a pressing need for a comprehensive, actionable framework aligned with the Town’s most recent goal of achieving zero ~~-~~emissions by 2040. In addition to reducing greenhouse gas (GHG) emissions, Brookline must address its vulnerability to the impacts of natural hazards due to climate change, including severe wind storms, extreme temperatures, and flooding.

The Town of Brookline has invested in past sustainability and resiliency assessments, including the Climate Vulnerability Assessment (2017), Climate Action Plan (2018), Climate Resilience Design Guidance (2019), Urban Forest Climate Resiliency Master Plan (2021), Zero Waste Framework (2021) and Hazard Mitigation Plan (2023). These will be assessed and integrated as appropriate into the final CARP and associated implementation plans for the priority climate actions.   

This updated and integrated plan will provide a comprehensive roadmap for addressing climate change and its anticipated impacts in Brookline, focusing on advancing key policies, programs, and projects that were identified in previous Town efforts, but have yet to be fully implemented. The consultant team will review the Town’s climate mitigation and adaptation goals and provide clear and prioritized strategies and actions to accomplish them. The updated Climate Action and Resiliency Plan will compile the findings of the aforementioned reports, assess recent actions, and redefine and prioritize the strategies previously identified. This plan should be measurable, efficient, action-oriented, and practical. Each action item will include a detailed implementation plan, including the identification of partners that should be involved, potential funding strategies, schedule, and equity considerations.

In addition, the plan will assess the cost-effectiveness of each proposed action, weighing the financial investment against its expected impact in reducing emissions or increasing climate resilience. This cost-benefit analysis will ensure that Brookline’s climate actions are both fiscally responsible and effective in combating climate change.

**SCOPE OF WORK**

The Town seeks proposals from qualified individuals, firms, or organizations to develop a high priority, high impact, CARP consistent with evolving science, technology, and public policy. This approach should include meaningful communication with and inclusion of Brookline’s most highly vulnerable and impacted Environmental Justice (EJ) populations.

The CARP will include both outcomes over which the Town of Brookline has direct control, such as Town buildings and infrastructure; and outcomes over which the town does not have direct control, but which the town can support or influence, directly or indirectly, such as private and commercial real estate and private transportation choices.

The final CARP should be succinct and efficient and should clearly delineate high priority and high impact initiatives that the Town can measure and track. These initiatives should be prioritized and recommended for implementation over a reasonable timeframe to equitably address both climate mitigation and adaptation-related challenges and be aggressive enough to help Brookline achieve its target goal of net-zero carbon emissions by 2040.

The Consultant Team will work with Town staff to analyze data and develop actionable recommendations for the Town. The Zero Emissions Advisory Board (ZEAB) will participate in public meetings with the Consultant Team and staff. It is anticipated that there will be approximately 2 public forums with 2 final public presentations of the plan and findings, in addition to monthly staff/technical committee working progress meetings. **All files considered public record (including, but not limited to, all documents/presentations used in meetings, and the final** CARP**) must be ADA compliant (screen-reader friendly)**. Screen-reader friendly documents include headings, meaningful hyperlinks, alternate text for images, and an appropriate identified reading order. Much of the work in between the Consultant Team and Town staff will be handled electronically and via telephone, as well as a bi-weekly Zoom meeting to check in on the work plan and associated deliverables.

It is anticipated that the scope of work for the Climate Action and Resiliency Plan will include the following:

1. Gather and Review Existing Climate Data, Town Plans, and Conduct Baseline Assessment of Existing Town Climate Mitigation and Adaptation Actions and Goals
2. Develop Community Engagement Plan for CARP Development and Implementation
3. Host Community Input Forums for Feedback on Plan Development and Prioritization of Actions
4. Meet and Consult with Relevant Town Departments (Building Department, Planning Department, Health and Human Services, Emergency Management, Department of Public Works)
5. Identify and Prioritize Mitigation and Adaptation Actions
6. Draft Implementation Strategies for Priority Actions
7. Plan Development
8. Create Dashboard to Track Implementation Progress
9. Presentation to ZEAB, Select Board, and other Relevant Boards and Commissions

**Project Tasks and Deliverables**

This section outlines the seven major project tasks and associated deliverables:

1. **Technical Memorandum & Matrix** – The consultant will conduct a review of existing Town plans, initiatives, and goals to identify a high priority, high impact list of potential climate mitigation and adaptation-related initiatives. Many of these may already exist in Town plans; however, this matrix should capture them in one place and help to prioritize based on Town resources, funding sources, efficacy, and measurability. The findings in the matrix will be summarized in a technical memorandum.
2. **Interviews with Town Officials -** The consultant will conduct interviews with key town officials, including the Director of Sustainability, the Zero Emissions Advisory Board, the Select Board, Department Heads, and other relevant stakeholders, to gather insights and ensure alignment with existing town initiatives and goals. DELIVERABLE NEEDED
3. **Incorporation of Best Practices -** The consultant will research and incorporate best practices from leading community climate action plans, ensuring Brookline benefits from proven strategies and innovative solutions that have been successful in other municipalities. The Consultant will draw on their expertise in climate action and sustainability, to provide analysis and recommendations tailored to Brookline’s specific needs. This includes evaluating local vulnerabilities, opportunities for emissions reduction, and potential cost savings from different strategies. These findings will be summarized in a best practices guide.

1. **Evaluation and Selection Criteria** – The consultant will lead the effort to establish both quantitative and qualitative criteria to evaluate and prioritize climate mitigation and adaptation programs, policies, and projects. These criteria will be well defined in the plan so that future actions can be prioritized using the same criteria.

1. **Community Outreach, Communication and Meaningful Engagement** **Plan**– The consultant will produce a Community Engagement Plan at the outset of the project that incorporates elements of Brookline’s Community Engagement Plan where applicable and outlines how the following elements will be taken into consideration during plan development and  implementation: Equity and Inclusion, Outreach Tools (website, print and digital media, social media, etc), Surveys, and Focus Groups. The consultant may also utilize existing data sets from the Town’s recent Comprehensive Plan community process.

1. **Public Forums** – The consultant is responsible for organizing and leading at least two public forums that outline the plan development process, review existing data sets, and provide opportunity for public input and comment on the CARP.

1. **Draft and Final Plans** – The consultant will develop both a draft and final CARP including a list of high priority, high impact actions. Each action will include SMART goals and objectives, outline responsible parties, and identify potential funding sources. In addition, the consultant will integrate best management practices (BMPs) and the latest technologies for climate mitigation and adaptation, ensuring that recommended actions are tailored to Brookline’s unique needs and challenges, enhancing the effectiveness and feasibility of each action.

1. **Dashboard to Track Implementation Status** – The consultant will develop a “Climate Action Dashboard” that the Town can utilize to track the implementation status of various actions outlined in the plan. This will be a web-based tool that can easily function on the Town’s existing web platform.

1. **Final Report** **and Presentation** – The consultant will complete a Final Report for the project that documents process, input, and implementation plans for priority actions in the CARP. The final report will be presented to both the ZEAB and Select Board for review and approval.

**Consultant Qualifications:**

The successful consultant or consulting team must have demonstrated expertise in climate action planning, including the development of comprehensive strategies for reducing greenhouse gas emissions and enhancing climate resilience. Essential qualifications include:

1. **Relevant Experience:** A proven track record in developing climate action and resiliency plans for municipalities or regions, particularly with a focus on achieving zero-emissions goals and addressing vulnerabilities to climate-related hazards (e.g., flooding, extreme weather, heat waves).
2. **Technical Expertise:** In-depth knowledge of climate science, greenhouse gas accounting, and adaptation and mitigation strategies. Familiarity with best practices in sustainability, renewable energy, energy efficiency, electrification, and carbon reduction technologies is essential.
3. **Cost-Benefit Analysis Skills:** The ability to assess and analyze the cost-effectiveness of various climate actions, balancing financial investment with the projected impact on emissions reduction and climate resilience.
4. **Policy and Regulatory Knowledge:** Expertise in local, state, and federal climate policies and regulations, as well as experience working with municipal governments to navigate compliance, permitting, and funding opportunities for climate initiatives.
5. **Stakeholder Engagement:** Experience in working collaboratively with diverse stakeholders, including local governments, community groups, residents, businesses, and advocacy organizations. The consultant must be able to facilitate public engagement processes and integrate community feedback into the final plan.
6. **Project Management:** Strong project management skills, including the ability to manage complex projects with multiple deliverables, coordinate with various partners and agencies, and meet deadlines.
7. **Equity Considerations:** A demonstrated commitment to equity and environmental justice, ensuring that climate strategies address the needs of vulnerable populations and disadvantaged communities.
8. **Data-Driven Approach:** Ability to use data and metrics to inform decision-making, establish baselines, and track the effectiveness of climate actions over time. The consultant should be capable of integrating the latest climate models and projections into the planning process.

These qualifications will ensure that the consultant can deliver a comprehensive, actionable, and fiscally responsible climate action plan that meets the needs of the Town of Brookline.

**BUDGET**

The primary funding for this project is from American Rescue Plan Act funds.  **The project cannot exceed the budget allocated.**  The Grant breakdown is as follows:

* $95,000 – Amount of grant funds.  To be used to complete the project tasks and deliverables.
* $5,000 – Supplementary Town stipends for participation in community meetings, food at community meetings, and various printed materials.

**TIMELINE**

**Anticipated Plan Development and Public Meeting Schedule (subject to change):**

|  |  |
| --- | --- |
| **Item** | **Due** |
| Proposal Responses | November 2024 |
| Proposal Evaluation | November 2024 |
| Proposal Evaluation Interviews | December 2024 |
| Award & Execute Contract | December 2024 |
| Kick-off Meeting with Town Staff | January 2025 |
| Review Existing Data and Plans | January 2025 |
| Public Forum #1 | March 2025 |
| Meet with Community Stakeholders and Town Departments | March 2025 |
| Identification and Prioritization of Mitigation and Adaptation Actions | March – April 2025 |
| Public Forum #2 | May 2025 |
| Draft Implementation Strategies for Priority Actions | May 2025 – July 2025 |
| Creation of Implementation Dashboard | July 2025 |
| Draft Plan Presentation to ZEAB | September 2025 |
| Final Presentation to ZEAB and Select Board | October 2025 |

ADDITIONAL INFORMATION

1. Proposals are limited to Twenty (20) pages of narrative not including Conflict of Interest (COI) statement and project examples.
2. Provide COI policy statement on how your firm will identify any previous or continuing work with applicants or the applicant’s team.
3. Proposals shall include submission of technical qualifications and two similar completed project examples with references.
4. Failure to complete the enclosed forms, to answer any questions or to provide the required documentation will be deemed non-responsive and will result in rejection of the proposal, unless the Town determines that such failure constitutes a minor informality as defined in MGL c30B.
5. All requests for clarification and any questions about information contained in this RFP must be directed to:  David Geanakakis, Chief Procurement Officer, Purchasing Division, email: dgeanakakis@brooklinema.gov
6. No requests or questions will be accepted after XXX, at 12:00pm (noon).  The proposer must include with any request or question the name, address, telephone number, and e-mail address of the person submitting a question.  If the Town determines that an answer or response to a request or question is appropriate, the Town will provide such answer or response in writing to all proposers in the form of an Addendum to this RFP.  Proposers are not entitled to rely upon any answers or responses unless the same have been so issued by the Town.
7. Proposers must acknowledge any receipt of amendment(s).
8. In the case of a discrepancy on the Price Summary Form between written and numerical amounts, the written amount shall prevail.
9. Nothing in this RFP shall be construed as superseding the Town’s By Laws, which shall at all times control activities under any contract.
10. A complete proposal shall include all of the following documents and shall be organized in the following manner:    (All forms are follow Appendix F)
11. Non-Collusion
12. Tax Compliance Form
13. Article 4.4 and 4.5 Brookline By-Laws Certification
14. Article 4.8 Living Wage Certification
15. Instructions to Proposers
16. General Conditions
17. Proposal Signature

**SUBCONTRACTING**

The Contractor shall not subcontract or sublet any portion of the work unless authorized to do so by the Town and only after a review of the credentials of the subcontractor by the Town.  At no time can the subcontracted portion of the work be greater than 15% (fifteen percent) of the contract workload.

**PAYMENT**

The Contractor will be paid per approved invoice on a monthly basis. An invoice will be presented for the services performed.  This invoice shall, as a minimum, identify the itemized work that was done, where it was done, and when it was done.  Prevailing Wage Rates not applicable or required.

**REJECTION OF PROPOSALS**

The Town of Brookline reserves the right to reject any and all proposals.

**CANCELLATION OF CONTRACT**

The Town of Brookline reserves the right to cancel and terminate the contract in the event that the service provided by the Contractor proves to be unsatisfactory.

**BASIS FOR AWARD OF CONTRACT**

Award of this contract shall be made to the most advantageous proposal, after the opening of the proposals. The Town reserves the right to reject any and all proposals if deemed in the Town’s best interest.  Execution of the contract will depend upon a review by the Chief Procurement Officer.  Prior work with the Town will be considered during the evaluation process.

An award is contingent upon meeting all insurance and contract standards.

**INSURANCE**

The Contractor shall procure and maintain in full force and effect during the term of an Agreement, insurance in accordance with the Town of Brookline’s Insurance Requirements (Appendix D).

Contractor will furnish a Certificate of Insurance form incorporated into and made a part of the Agreement naming the Town of Brookline as an “Additional Insured” on the appropriate insurance policies.  Properly executed certificates must be on file with the Municipality prior to commencement of the Agreement.

**CONTRACT LENGTH**

The Contract shall be for the duration of time specified in the contract award. This Contract may be extended under the same terms and conditions for one (1) additional twelve (12) -month period at the sole discretion of the Town with permission from the Commonwealth to extend the grant period.  The Town will provide the successful Proposer(s) with notice of its intention thirty (30) days prior to the expiration of the Contract.

**EVALUATION OF SUBMITTALS**

**Minimum Evaluation Criteria**

The proposal includes all of the items for a complete proposal, including, but not limited to:

A. Project Goals

B. Project Philosophy and Approach

C. Project Leadership, Organization and Management

1. Project Manager

2. Project Team

3. Task assignments to each member of the project team

4. Commitment of time by each member of the project team

D. Work Program:  Objectives and Anticipated Outcomes

E. Deliverables

F. Work Schedule

**Comparative Evaluation Criteria**

Each Technical Proposal meeting the Minimum Evaluation Criteria shall be rated according to the following Comparative Evaluation Criteria:

1. Respondent Profile

a. General capabilities

b. Years in business

c. Experience of team developing and implementing Climate Action Plans and/or Climate Resiliency Plans

d. Complexities and size of similar studies

2. Study Plan

a. Understanding of the project

b. Creativity and innovation

c. Methodology & approach

d. Technical experience

e. Public engagement approach and experience engaging diverse populations in plan development

f. Experience in meeting deadlines

**Comparative Evaluation Criteria**

All responsive proposals will be judged against the Comparative Evaluation Criteria detailed below. The Town will rank each proposal as:

***Highly Advantageous*** – the proposal fully meets and significantly exceeds the standards of the specific criterion;

***Advantageous*** – the proposal fully satisfies the standards of the specific criterion;

***Not Advantageous*** – the proposal does not fully meet the standards of the specific criterion, is incomplete, unclear, or both.

The Selection Committee shall rate and rank each technical proposal meeting the Minimum Evaluation Criteria according to the Comparative Evaluation Criteria listed below. The Fee Proposal Forms will then be opened and reviewed. The Selection Committee will then select the most overall advantageous proposal. Such ratings shall be included in a written recommendation for selection.

**Quality and Depth of Project Experience**

**Highly Advantageous** – The project proposal demonstrates superior experience in providing services related to the Town’s requirements. The project proposal demonstrates a wide depth of experience with similar projects (5 or more), and prior experience with similar contracts. Project work samples are of outstanding quality in content and technical presentation.

**Advantageous** – The project proposal demonstrates solid experience in providing services related to the Town’s requirements. The project proposal demonstrates a good depth of experience with similar projects (3 to 5), and prior experience with similar contracts. Project work samples are of good quality in content and technical presentation.

**Not Advantageous** – The proposer has limited experience in providing services related to the Town’s requirements or with similar projects (less than 3), and prior experience with similar contracts. Project work samples minimally meet current standards for content and technical presentation.

**Qualifications of the Proposer**

**Highly Advantageous** – The proposer’s resume(s) demonstrate that proposer has superior training, educational background and work experience appropriate to the project described herein and all key project personnel demonstrate professional experience well beyond the minimum requirements.

**Advantageous** – The proposer’s resume(s) demonstrate that proposer has adequate training, educational background and work experience appropriate to the project described herein and all key project personnel demonstrate professional experience that meets or somewhat exceeds the minimum requirements.

**Not Advantageous** – The proposer’s resume(s) do not demonstrate that proposer has adequate training, educational background and work experience appropriate to the project described herein.

**Desirability of approach to the project, demonstrated understanding of the community’s climate goals, and proposer’s ability to undertake and complete this project in a timely manner**.

**Highly Advantageous** – The proposal demonstrates a superior approach to the subject material, an understanding of effective climate mitigation and adaptation actions, and a clear analysis of the time required for each phase of the project. The proposal demonstrates a strong understanding climate change and the associated challenges in New England communities. All references confirmed that consultant had met schedule expectations and delivered an “on-time” project.

**Advantageous** – The proposal demonstrates a good approach to the subject material, an understanding of effective climate mitigation and adaptation actions, and a clear analysis of the time required for each phase of the project and presents a time schedule that meets the project requirements. The great majority of references stated that the consultant was able to meet schedule expectations and delivered an "on-time" project".

**Not Advantageous** – The proposal does not demonstrate a desirable approach to the project and does not demonstrate a clear understanding of effective climate mitigation and adaptation actions. More than one reference indicated that consultant had been unable to meet the agreed-upon project schedule.

**Overall Quality of Client References**

**Highly Advantageous** – All references provided were successfully contacted, and each reference gave exceptionally favorable feedback regarding the proposer’s performance, specifically citing the proposer’s ability to meet deadlines, communicate effectively, and deliver high-quality services and deliverables. Every reference stated they would unequivocally hire the proposer again for a similar project.

**Advantageous** – The majority of references provided were successfully contacted and offered positive feedback on the proposer’s performance, including their ability to meet deadlines, communicate effectively, and deliver quality services and deliverables. Most references stated they would hire the proposer again for a similar project without hesitation.

**Not Advantageous** – More than one reference expressed concerns regarding the proposer’s performance, including challenges related to deadlines, communication, or the quality of services and deliverables. These references indicated they would be unlikely to hire the proposer again for a similar project.

**Completeness and Quality of Proposal**

**Highly Advantageous** – Response is complete, concise, informative, and highly detailed. Proposal reflects that proposer is able to perform in a superior manner acceptable to the Town. Evaluation team is completely convinced about the proposer’s ability to provide the level of services as required by the Town. Proposal demonstrates excellent communication and documentation skills.

**Advantageous** – Response is complete, informative, and meets criteria for responsiveness. Evaluation team finds proposal reflects that proposer is able to perform in an adequate manner acceptable to the Town. Proposal demonstrates a good level of communication and documentation skills.

**Not Advantageous** – Response lacks a comprehensive approach, but meets criteria for responsiveness. Evaluation team finds proposal reflects that proposer may be able to perform in a manner acceptable to the Town. Communication and documentation skills appear only adequate.

**Interviews**

After the review of the Technical Proposals, the Selection Committee may, at its discretion, schedule interviews with any or all of the proposers for the purpose of further evaluation of the proposer’s qualifications and ability to provide the required services.  Based on the presentation and written Technical Proposal submitted, interviewees will be rated:  highly advantageous, advantageous, not advantageous, or unacceptable, in accordance with the provisions of M.G.L. Ch. 30B.

**MINORITY BUSINESS ENTERPRISE PROGRAM**

Minority and women owned business enterprises are encouraged to submit proposals and will be given every opportunity to participate in Town of Brookline contracts.

The Proposer is encouraged to submit Business Diversity Certification information in their proposal submittal.  This certification may be from the Commonwealth of Massachusetts, regionally or nationally based organizations and industry sources.

**Clarification**

The Town reserves the right to contact any consultant to clarify its Proposal. The Town may require all or some of the proposers who meet the minimum criteria to make an oral presentation (interview) to the Town.

**Rejection of Proposal**

The Town reserves the right to reject any and all Proposal for non-conformance to the terms of this RFP and to applicable law and misrepresentation, and failure to submit costs in a separate sealed Price Proposal envelope.

**Execution of Agreement**

The Town will prepare and submit to the selected consultant a contract that will incorporate by reference the consultant’s Proposal. Before an agreement is executed the successful proposer will be required to submit a certificate of tax compliance in accordance with the provisions of MGL Chapter 62C Section 49A.