

Dear Town Meeting Colleagues: The Planning Process Study Committee is pleased to share our draft Request For Proposals for a comprehensive planning process with you. With just a few finishing touches remaining on the RFP and then the bid review and consultant selection processes to come, we anticipate a late Fall 2023 launch for the Comprehensive Planning process. The zoning reform process to immediately follow will be bid separately. I want to thank the Planning Department staff: Kara Brewton, Victor Panak and especially Emily DeHoog for all their hard work putting this together, along with all of the members of the PPSC Committee. Please see the PPSC webpage for Committee membership, meeting recordings and all other committee materials. <https://www.brooklinema.gov/2483/Planning-Process-Study-Committee>

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This is the Request for Proposals draft as of 5-17-23 for the Town of Brookline's Comprehensive Plan.

Background (under construction)

The Town of Brookline's most recent Comprehensive Plan is the 2005-2015 Comprehensive Plan, approved in 2005. Although there has not been a Comprehensive Plan in eighteen years, the Town has produced many different plans and studies since the last Comprehensive Plan that include goals and recommendations that are still relevant and should be incorporated into the new Comprehensive Plan if consistent with community input. Previous planning documents should be integrated in background data and the plan recommendations. A contact for each plan/study/process will brief the selected consultant team so that key recommendations can be efficiently carried forward in the new Comprehensive Plan¹.

Climate and Sustainability

- Climate Vulnerability Assessment & Action Plan (2018)

Public Space & the Natural Environment (includes hazard mitigation)

- Open Space & Recreation Plan (2018)
- Brookline Urban Forest Climate Resiliency Master Plan (2021)
- Hazard Mitigation Plan (2015)
- Historic Districts [link]
- Neighborhoods [link]

Housing

- Housing Production Plan (2016, 2023)
- Community Development Block Grant (CDBG) Consolidated Plan (FY 2021-2025)

Infrastructure

- Department of Public Works Strategic Plan (2022-2023)

Economic Commercial Development

- Perspectives and Opportunities for Brookline's Commercial Areas (2018)

Transportation & Mobility

- Complete Streets Policy (2016)
- Route 9 East Visioning Study (2015)
- Brookline Green Routes Bicycle Network Plan (2022)
- Massachusetts Bay Transit Authority lines [link]
- Washington Street Complete Streets Plan/Study
- Bridle Path Plan/Study

Other

¹ See webpage X for list of background reports

- Community Major Parcel Study (2018)
- Strategic Asset Plan (2018)
- MBTA Communities Plan (ongoing)
- Boylston Street Corridor (ongoing)
- Community Preservation Act- Preservation Plan (ongoing)

Guiding Principles & Processes

The Plan should integrate the framework and organizing principles as identified by the American Planning Association’s (APA) Sustaining Places Initiative (APA PAS Report 578 Sustaining Places: Best Practices for Comprehensive Plan”; January 2015). The consultant’s process and product should reflect an understanding and incorporation of the key principles, processes, and attributes identified in Section 2 of the APA Report, with particular importance placed on the processes of Authentic Participation and Accountable Implementation and the principles of Livable Built Environment, Resilient Economy, and Interwoven Equity².

Required Principles for the Comprehensive Plan³:

1. **Livable Built Environment:** Ensure that all elements of the built environment, including land use, transportation, housing, energy, and infrastructure, work together to provide sustainable, green places for living, working, and recreation, with a high quality of life.
2. **Harmony with Nature:** Ensure that the contributions of natural resources to human well-being are explicitly recognized and valued and that maintaining their health is a primary objective.
3. **Resilient Economy:** Ensure that the community is prepared to deal with both positive and negative changes in its economic health and to initiate sustainable urban development and redevelopment strategies that foster green business growth and build reliance on local assets.
4. **Interwoven Equity:** Ensure fairness and equity in providing for the housing, services, health, safety, and livelihood needs of all citizens and groups.
5. **Healthy Community:** Ensure that public health needs are recognized and addressed through provisions for healthy foods, physical activity, access to recreation, health care, environmental justice, and safe neighborhoods.
6. **Responsible Regionalism:** Ensure that all local proposals account for, connect with, and support the plans of adjacent jurisdictions and the surrounding region.

Required Processes:

1. **Authentic Participation:** Ensure that the planning process actively involves all segments of the community in analyzing issues, generating visions, developing plans, and monitoring outcomes.

² <https://www.brooklinema.gov/DocumentCenter/View/36599/Sustaining-Places--Best-Practices-for-Comprehensive-Plans>

³ From SUSTAINING PLACES: BEST PRACTICES FOR COMPREHENSIVE PLANS

We define authentic participation to include:

- a. Shared Vision for the Future
 - b. Dialogue to Balance Competing Goals
 - c. Plan for and protect public investments
 - d. Decision-making guidance
 - e. Effective Outreach and Consultation
 - i. Framing questions for meaningful feedback
 - ii. Sharing knowledge – data on existing conditions and trends
 - iii. Collect and synthesize feed back
 - iv. Utilize existing networks and build on them
 - v. Go to where people are
 - vi. Provide multiple ways to engage in a variety of mediums
2. **Accountable Implementation:** Ensure that responsibilities for carrying out the plan are clearly stated, along with metrics for evaluating progress in achieving desired outcome

Required Attributes:

To be effective, plans must be coherent and well presented, while articulating persuasive visions and clearly communicated goals and ideas. The following two attributes embody these traits:

1. Consistent Content

- a. Assess strengths, weaknesses, opportunities, and threats.
- b. Establish a fact base.
- c. Develop a vision of the future.
- d. Set goals to support the vision.
- e. Set objectives in support of the goals.
- f. Set policies to guide decision making.
- g. Define actions to carry out the plan.
- h. Use clear and compelling features to present the plan.

2. Coordinated Characteristics

- a. Be comprehensive in the plan's coverage.
- b. Integrate the plan with other local plans and programs
- c. Be innovative in the plan's approach
- d. Be persuasive in the plan's communications.
- e. Be consistent across plan components.
- f. Coordinate with the plans of other jurisdictions and levels of government.
- g. Comply with applicable laws and mandates.
- h. Be transparent in the plan's substance.
- i. Use plan formats that go beyond paper.

Community Engagement

Respondents to the RFP should provide a proposed Community Engagement Plan. The plan should incorporate elements of Brookline’s Community Engagement Plan⁴ where applicable and the Plan should also, at a minimum, incorporate the elements below. The consultant should detail how they propose to create feedback loops from community outreach activities and display how that information will impact the Comprehensive Plan on the website and social media. The selected consultant will be provided with a preliminary list of community groups and contacts to facilitate the organization of community events.

The successful consultant will have completed multiple projects that included innovative public engagement opportunities to reach residents that typically do not participate in town government but have strong feelings about the future of their town with regard to development, equity, infrastructure, and sustainability. Public engagement is considered central to the process, as opposed to an add-on. It should draw from residents’ hopes and concerns for the Town’s future and ensure that all voices are heard. Input from engagement will be synthesized into a clear set of choices, gaining feedback from Team Brookline 2040, staff, and public surveys. Selected options will ultimately lead to goals, strategies, and objectives.

1. Equity and Inclusion

The Town is seeking a consultant team that will establish a racial and economic equity framework or lens within the Community Engagement Plan. This will be applied to engagement and the review of existing policies that guide the town’s growth and development, engagement efforts in the planning process, and in the evaluation of potential recommendations that come out of the planning process.

The equity analysis should incorporate inclusionary best practices described in APA’s Sustaining Places report, APA’s Planning for Equity Policy Guide (APA Policy Guide; June 2019), racial equity tools published by the Government Alliance on Race and Equity (www.racialequityalliance.org and Brookline’s Office of Diversity, Inclusion and Community Relations⁵), and other relevant tools.

There should also be intentional outreach to populations not typically involved in town processes including (but not limited to): low-income populations, racial and ethnic minorities, renters, residents of public housing, college students, school-aged students, families with children, people with low mobility, people with technological challenges, and people who have low proficiency in English or people in which English is not their primary language. Experience with working with diverse populations is highly advantageous.

2. Role of Team Brookline 2040

The Comprehensive Plan process will be handled primarily with support and guidance from the consultant team, the Department of Planning and Community Development (DPCD), and a steering committee named “Team Brookline 2040”. This group will be comprised of representatives of all

⁴ <https://www.brooklinema.gov/DocumentCenter/View/33669/CE-Plan---v3-formatted>

⁵ Resources under “Government Alliance on Race and Equity” at <https://www.brooklinema.gov/545/Diversity-Inclusion-Community-Relations>

segments of the Brookline community such that all feel represented by someone or a group on the committee. A facilitator from the consulting team will work directly with the team captain of Team Brookline 2040 and DPCD's project manager.

Part of the consultant's Community Engagement Plan should include defining a clear role for Team Brookline 2040 that ensures that the Team will be properly integrated into the consultant's process. The Town invites the consultant to propose options for Team member appointments, roles, and responsibilities. However, Team Brookline 2040 will be expected to contribute, at a minimum, the following elements to the Comprehensive Plan process:

- Provide assistance in ensuring everyone in the Brookline community is represented in the process
- Provide guidance on community engagement events
- Option to volunteer to facilitate community events
- Review and give feedback to consultants on deliverables
- Review and consider varied scenarios developed by the consultant
- Host bi-monthly listening sessions
- The Team Brookline 2040 Chair will be part of any discussions with Boards, Commissions, and Committees for continuity purposes and as a representative of the Team.

2. Bi-Monthly Comprehensive Plan Listening Sessions

The Town's Select Board, Planning Board, and representatives from Team Brookline 2040 will meet every other month. At these meetings, the consultant team will provide updates on the Comprehensive Planning process. These meetings will also serve as public listening sessions for feedback on the process. The Planning Board must adopt the Comprehensive Plan at the end of the process according to state law. Additionally, the goal is that the Select Board also endorse the Comprehensive Plan to indicate support in overall Town goals and priorities.

3. Accommodations

Evaluate the need for accommodations for specific engagement activities and coordinate with staff to provide services when appropriate. Accommodations include language translation, American Sign Language interpreters, refreshments, childcare, compensation, and transportation to meetings.

4. Outreach Tools (not limited to)

- Comprehensive Plan Webpage (detailed in the following section)
- Online Surveys
- Social media: engagement activities and advertising events
- Community meetings, possibly hosted by Town Meeting members
- Opportunities for community members to provide visions of Brookline's future
- Other innovative mechanisms designed by the consultant for robust community participation

Process Phases and Deliverables

The Town of Brookline is targeting a twenty-four month time frame for completion of the project from notice to proceed. Respondents to the RFP should provide a proposed project schedule. The plan will be based on a 15-year planning horizon. For reference only, below is our estimate of proportional cost for different segments of the Comprehensive Plan and an estimated timeline. **We invite proposals that vary from the information provided below.**

Pre-Planning- 15%

1. **Deliverable: Final Work Plan (Fall 2023)**

The first draft of the work plan must be included in the bid response. The consultant team will work with the Planning and Community Development Department staff and Team Brookline 2040 to further refine the work plan after the notice to proceed is issued. A clear work plan (with key dates, activities, and milestones) will be finalized and signed off on by the Select Board and Planning Board.

2. **Deliverable: Final Community Engagement Plan (Fall 2023)**

The first draft of the community engagement plan must be included in the bid response. The consultant team will work with the Planning and Community Development Department staff and Team Brookline 2040 to further refine the work plan after the notice to proceed is issued. A clear engagement plan (with an equity framework/lens, key dates, activities, and milestones) will be finalized and signed off on by the Select Board and Planning Board.

3. **Meet with all Departments and Town Administrator to understand work underway, current issues and opportunities, recent plans, and current and long-term Town priorities. (Fall 2023)**

A list of recent plans and contacts is included [here](#). Leads on each plan will meet with the consultant team and brief them on the plan.

4. **Deliverable: Comprehensive Plan Webpage (Fall 2023)**

- Displays key background data graphically (maps and visual data)
- Shows upcoming events
- Updated weekly or promptly following significant milestones
- Hosts ongoing engagement utilizing tools such as: interactive map, surveys, and feedback tools
- Reports on results of engagement efforts, meeting summaries, and identification of any next steps
- Topic specific pages will be produced during the “Topic-Based Recommendations” phase
- Set up a clear, accessible, and dynamic webpage on consultant’s own platform. Access/licenses will be given to staff to post content on the primary landing page if urgent information changes are needed, but the consultant team will be responsible for this webpage, including any responses to community member inquiries or ideas.

5. **Deliverable: Challenges and Opportunities Analysis (Fall or Winter 2023)**

Generate demographic data and trends, regional and local growth scenarios, and fiscal pressures of municipal government. Assess challenges and opportunities based on this information. Utilize and share key background data to develop a shared understanding for vision recommendations. Share report on the website.

Visioning- 15%

1. **Plan Kick-Off (Fall or Winter 2023)**

Event and/or an engagement campaign to signal the start of planning process. Event and/or an engagement campaign to signal the start of planning process. Among other things, this kick-off event should provide the public with a general summary of key findings learned during the various pre-planning tasks (demographics, issues/opportunities, Town priorities, etc.), a general roadmap of the Comprehensive Plan process, and a clear set of expectations and opportunities for future public engagement options. Utilize Brookline Interactive Group to create multi-media and videos for outreach and engagement.

2. **Visioning Engagement Campaigns and Events (Fall & Winter 2023)**

Social media engagement, surveys, events, and pop-ups. Train and work with Team Brookline 2040 to help with outreach efforts and events. Community engagement events should be organized in a manner that intentionally captures, or maximizes access for, marginalized groups. When possible, pop-up stalls and community engagement events should be coordinated with existing Town events to maximize participation. Utilize Brookline Interactive Group to create multi-media videos for outreach and engagement.

3. **Small Group Conversations: (Fall & Winter 2023)**

Visioning focus groups to engage specific groups of people and key stakeholders. Intentionally includes individuals and groups typically not involved in Town processes but should also include recognized civil associations such as merchant associations and civic groups.

4. **Deliverable: Produce Vision Statements (Winter 2023)**

The Comprehensive Plan's Vision Statements should capture the aspirations of Brookline residents for the future of the Town. Vision Statements should be very broad in their scope but clear enough that the key topics of importance to the Town are clearly stated in the Vision Statements and that numerical goals and strategies for action can be generated from them with further community input. Get feedback from Team Brookline 2040 on the vision statements and incorporate the feedback into the draft.

5. **Present final vision statements during listening session to the public, Planning Board, and Select Board (Winter 2023 & Spring 2024)**

Topic-Based Recommendations- 30%

1. **Topic Based Engagement Campaigns and Events (Spring & Summer 2024)**

Social media engagement, surveys, events, and pop-ups. In the development of the topic sections, the consulting team will need to help the community set goals in the presence of different (and sometimes conflicting) interests. Get input from the public about the thematic map. Train and work with Team Brookline 2040 to help with outreach efforts and events.

2. **Consult small groups of stakeholders about pertinent topics (Spring & Summer 2024)**
Topic-based focus groups to engage key stakeholders and applicable groups. Intentionally include groups and individuals typically not involved in Town processes.
3. **Consult Town Departments about pertinent topics. (Spring & Summer 2024)**
4. **Deliverable: Set Goals and Topic Sections (Summer 2024)**
Base goals to address critical issues raised from topic sections, Town visions, Challenges & Opportunities, and community feedback. At least one measurable objective should be included in each Topic Section. Get feedback from Team Brookline 2040 and during listening session.
5. **Deliverable: Propose Strategies (Summer 2024)**
Identify strategies based on Town vision statements, goals, and to address Challenges & Opportunities. Get feedback from Team Brookline 2040 and during listening session.
6. **Deliverable: Thematic Map (Summer 2024)**
Develop areas of the Town to Conserve, Enhance, Transform based on staff and community engagement. Get feedback from Team Brookline 2040 and during listening session.
7. **Deliverable: Growth and Change Scenario Testing Analysis (Fall 2024)**
 - a. Test trade-offs for strategies to respond to future population growth and anticipated changes.
 - b. Test tools and strategies in areas identified in the Thematic Map. Utilize modeling techniques in Transform, Conserve, and Enhance areas to test and get feedback from staff and the public.
 - c. Use future projection data to analyze and address conditions in the next 15 years such as population and climate impacts change.
 - d. Show estimates of implications or impacts of strategies on Town infrastructure and expenditures/capital investments where appropriate.
 - e. If appropriate, propose alternative strategies based on the testing analysis.
8. **Deliverable: Draft of Topic Sections with Goals, Strategies, and Objectives (Winter 2024)**
In each topic section, include the topic-specific barriers, gaps, and opportunities between existing policies/regulations as compared to the topic's defined long-term goals and objectives. Examples may include: a prioritized list of new zoning tools and other changes; identify key urban design principles that should guide new development for various settings in the city; identify policy changes or other steps that will be necessary to realize the plan recommendations; identify new programs and programmatic changes that will facilitate the vision.

Each topic section should cross multiple master plan elements as defined by the State. To be consistent with Massachusetts General Law Ch. 41, s. 81-D⁶, the Plan should highlight one-page summaries of each state-required element either within topic sections or in the appendix.

9. **Get feedback from Team Brookline 2040 on draft. (Winter 2024)**
Incorporate the feedback into the draft.
10. **Presentation to public on Topic Sections, Scenario Testing Analysis, and the Map (Winter 2024)**
11. **Presentation of Final Section draft and Scenario Testing Analysis, and Map to Select Board, Planning Board, and appropriate boards and commissions (Winter 2024 & Spring 2025)**
12. **Incorporate feedback into final topic section draft (Spring 2025)**
13. **Get approval on the Topic Sections from the Select Board & Planning Board (Spring 2025)**

Implementation- 35%

1. **Deliverable: Implementation Plan Draft (Spring 2025)**
 - Strategy and Phasing: Budget Implications: Estimate an order-of-magnitude costs of capital projects and the budget implications of operational initiatives; identify potential funding sources at the local, state and federal level, including third party sources.
 - Roles and Responsibilities: Identify leaders and other participants who will be responsible for each action step, both within Town government and with outside partners.
 - Development of Indicators: Develop a set of Indicators that are specific to the goals and objectives resulting from the town wide plan to allow the Town to effectively measure plan performance, implementation, or need for re-evaluation over time. This includes the establishment of baseline measurements based on previous research. Monitoring methods should be described and visualization and reporting methods to present indicators to the public and elected officials.

Get feedback from Team Brookline 2040 on the draft.

2. **Deliverable: Action Plan Document (Spring 2025)**
Translate the vision and plan recommended goals and objectives into specific action steps with short, medium, and long-term projects and initiatives, taking into consideration current

⁶ MA General Law Ch. 41, s. 81-D standard master plan elements: Goals and Policies Statement, Land Use Plan Element, Housing Element, Economic Development Element, Natural and Cultural Resource Element, Open Space and Recreation Element, Services and Facilities Element, Circulation Element, and Implementation Program Element.

priorities, funding, and capacity of Town and other partners. Phasing should include targeted progress towards each measurable goal.

3. **Meet with all impacted Departments and Town Administrator to discuss the Implementation Plan and Action Plan. (Spring 2025)**
4. **Deliverable: Comprehensive Plan Summary (1-3 pages) (Spring 2025)**
5. **Deliverable: Produce Engagement Section (with documentation in appendix) (Summer 2025)**
Get feedback from Team Brookline 2040 on the draft.
6. **Deliverable: Webpage for tracking progress (Summer 2025)**
Design a webpage that is set up to track progress on the Comprehensive Plan implementation. This will be set up by Town staff on a Town-hosted webpage and template. The consultant will provide all text, graphics and linked materials.
7. **Deliverable: Complete Comprehensive Plan Document and Appendices, native files (GIS, PDF, photos, Adobe files, engagement responses, data, contacts) (Summer 2025)**
The document should include all the previous deliverables.
8. **Deliverable: Reevaluation Schedule and Guidance (Summer 2025)**
Establish a schedule for re-evaluation of strategies and objectives over the 15 year time horizon of the plan.
9. **Get feedback from Team Brookline 2040 and Brookline staff on the tracking webpage and re-evaluation plan. (Summer 2025)**
10. **Presentation to the public on implementation (Summer 2025)**
11. **Presentation of draft to Select Board, Planning Board, and appropriate Boards and Commissions (Summer & Fall 2025)**
12. **Incorporation of input in implementation draft (Fall 2025)**
13. **Seek approval of the Comprehensive Plan from the Planning Board (Fall 2025)**
14. **Town to submit to the state for approval (Fall 2025)**