



CENTRAL MASSACHUSETTS REGIONAL PLANNING COMMISSION
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TOWN OF GRAFTON MASTER PLAN UPDATE: PHASE II & III SCOPE OF SERVICES

Scope of Services
December 30, 2022

Central Massachusetts Regional Planning Commission
MA Vendor Code No. VC6000159423



Overview

The Central Massachusetts Regional Planning Commission (CMRPC) is pleased to submit this Scope of Services for Phases II and III of the Grafton Master Plan Update. Having completed Phase I (data collection) in the Fall of 2022, CMRPC is prepared to facilitate the remaining phases and see the planning process through to completion. This submission outlines a work plan for Phase II and III Master Plan development. The Town may contract with CMRPC for all remaining phases simultaneously, or for each phase independently as funding is available.

Timeline

CMRPC is prepared to undertake Phases II and III upon execution of a contract. The final plan will be complete on or before June 30, 2024.

	Winter 2022- 2023	Spring 2023	Summer 2023	Fall 2023	Winter 2023- 2024	Spring/ Summer 2024
Phase II Tasks: Community Engagement & Plan Development						
Public Mtg. 1: Kickoff						
Community Engagement Campaign						
Community Survey						
Stakeholder Interviews						
Workshop 1						
Vision Statement Update						
Goals and Objectives Development						
Workshop 2						
Plan Development (Chapters)						
Public Mtg. 2: Presentation of Findings						
Phase III Tasks: Finalization & Implementation Plan						
Public Mtg. 1: Kickoff						
Plan Development (Non-Chapter Elements)						
Implementation Matrix						
Review, Comment and Revisions						
Public Mtg. 2: Presentation of Final Draft						

Phase II

Phase II Scope of Work

CMRPC proposes to assist the Town of Grafton in the development of its Master Plan by providing the following Phase II services:

- Community Engagement
- Strategy Articulation: Vision Statement update, Goals, Objectives, and Action Items
- Chapter Development

Community Engagement

CMRPC will launch a robust community engagement strategy in Phase II. A community survey will serve as the starting point for primary data collection and broader public input. Working with the Planning Department and Planning Board, CMRPC will develop a community survey to solicit input on the vision and goals of the prior master plan, and identify needs, preferences, and opportunities for the master plan chapters.

Public workshops and charettes will also serve as an important method of collecting community input. CMRPC will convene two workshops in Phase II. The details of these workshops will be determined at the Phase II Preliminary Kickoff Meeting. Several options exist for public workshops, including a traditional community visioning session, a fully remote visioning session, or a hybrid meeting. Assorted options for visioning exercises and breakout sessions exist. Whichever model the town selects, CMRPC will provide a mechanism for anonymous public comment.

In Phase II, CMRPC will also conduct stakeholder interviews. These interviews will serve as a detailed and nuanced source of community information. The project team will conduct at least ten interviews, with additional interviewing as needed to provide a thorough understanding of local conditions, needs, and opportunities. A list of stakeholders for interviews will be determined through consultation with the Planning Board and Planning Department.

Beyond public workshops/ charettes, CMRPC will facilitate at least two public meetings in Phase II: the Preliminary Kickoff meeting and the Presentation of Findings meeting, the latter of which will occur at the conclusion of Phase II.

At the onset of Phase II, CMRPC will work with the Town to launch a robust community engagement campaign. The campaign will continue throughout the planning process. It will include the development and maintenance of a branded website, promotion on social and traditional media, and other engagement methods.

Strategy Articulation: Vision Update, Goals, Objectives, and Action Items

CMRPC will review the Vision Statement from the 2001 Master Plan. As appropriate, the team will work with the Town to update the Vision Statement for alignment with contemporary town preferences. The project team will then develop a detailed set of strategies to advance the 2022 Vision. Each chapter of the Master Plan will include tiered strategies (goals, objectives, and action items), supporting the implementation of aspirational concepts. To develop these strategies, CMRPC will assess existing conditions, analyze data, review prior planning initiatives, conduct interviews, and analyze public input. The Master Plan Vision Statement, goals, objectives, and action items will reflect public preference, data, best practices, and legal authority and compliance. CMRPC will work with the Planning Department and Planning Board to develop and refine these core chapter elements.

Chapter Development and Presentation of Findings

The CMRPC project team will develop all Master Plan chapters as per the requirements of MGL Chapter 41, Section 81D and this Scope of Services. CMRPC will organize the findings into rough (i.e., preliminary, and not finalized with design elements or photos) drafts of Master Plan chapters. The general structure of the plan, chapter narratives, data, and analysis will be determined and developed in this phase. **This phase will not include layout, design, photography, videography, or non-chapter elements (e.g., executive summary, preface, introduction, cover pages, implementation matrix, appendices, etc.).** CMRPC will deliver a public Presentation of Findings and promote the Presentation of Findings meeting through various methods, including social media and local outreach. Boards and staff will be a particular focus of engagement. Following the presentation, with the approval of the Planning Board, the project team will circulate the draft chapters to relevant staff, boards, and commissions for their preliminary feedback.

The following chapters will comprise the body of the plan and constitute the primary Phase II deliverables:

Land Use: The land use chapter will identify present land use and designate the proposed distribution, location, and inter-relationship of public and private land uses. In developing the land use chapter, CMRPC will analyze existing and historic land use patterns, local development regulations and policies, and the Town's Priority Development Areas (PDAs) and Priority Preservation Areas (PPAs). This chapter will serve as a cornerstone for the other Master Plan chapters by identifying critical issues such as infrastructure availability, existing land uses, and resources. It will incorporate all available findings from a separate but concurrent Buildout Analysis project that CMRPC is undertaking for Grafton in 2022 and 2023. With this information in hand, the land use chapter will provide recommendations related to ensuring future compatibility between residential and commercial/ industrial development as well as guiding land preservation efforts.

Housing: The housing chapter will identify and analyze existing and forecasted housing needs including programs for the preservation, improvement, and development of housing. The chapter will analyze historical housing development patterns, existing housing characteristics, and current and projected housing needs. Our efforts will go beyond the discussion of affordable housing to address the broader issues connected to housing needs in Grafton. CMRPC planners will review zoning code and assess land use, housing needs, affordability gaps, infrastructure, market opportunities and challenges, and

alternative styles of housing (e.g., AirBnb, over 55, co-housing, and assisted living) to develop planning approaches and recommendations that will move Grafton in the direction of its vision for housing.

Economic Development: The economic development chapter will identify policies and strategies for the expansion or stabilization of the local economic base and the fostering of employment opportunities. The chapter will explore the Town's ability to generate commercial and industrial tax revenue, jobs, and commercial amenities. To that end, CMRPC will assess Grafton's economic base, including employment and demographic trends such as labor, number and type of jobs, employment, and wages. The chapter will explore resident and household wealth and poverty; the local tax base; vacant and developable land; the Town's industrial and commercial zoning stock; and other themes identified through community engagement and data analysis.

Natural and Cultural Resources: The natural and cultural resources chapter will provide an inventory of significant natural, cultural, and historic resources, and policies and strategies for the protection and management of such assets. The existing conditions section of the chapter will inventory historic resources, archaeological resources, scenic landscapes, culturally significant landscapes, and cultural organizations. CMRPC will include Grafton's Priority Preservation Areas (PPA) in the inventory and assessment for this element. CMRPC will also incorporate and update Grafton's Heritage Landscapes as identified in the Grafton Reconnaissance Report.

Open Space and Recreation: The open space and recreation chapter will provide an inventory of recreational resources and open spaces, as well as policies and strategies for the management and protection of such resources and areas. The chapter will update and build upon the Town's 2020 Open Space and Recreation Plan, which CMRPC helped develop. Parks, open space, and other recreational assets will be assessed based on standards for such assets utilizing NRPA Areas and Facilities Standards and guidance from the Massachusetts SCORP and recommendations for facilities per capita. The chapter will identify future needs and highlight priority park improvements and open space protection efforts, tying in the Town's identified Priority Preservation Areas (PPAs).

Services and Facilities: The services and facilities chapter will identify and analyze existing and forecasted needs for facilities and services used by the public. CMRPC will provide a summary and analysis of public services and facilities, including infrastructure. For public facilities, information gathering will focus on building conditions and lifecycle status, reuse potential, capacity/usability issues, upcoming capital needs, and compliance issues such as ADA and related state regulations. Opportunities to improve the energy- and resource-efficiency of Town infrastructure will be explored. Water, sewer, and stormwater infrastructure elements will be catalogued from existing data and assessed for condition, potable water and sewer treatment capacity vs. usage, gaps in service areas, capital needs, natural hazard/climate vulnerability, and regulatory status (e.g., MassDEP and EPA standards). Private utilities such as gas, electric and telecommunications will be reviewed to identify issues or locations of concern. Information will be gathered on Town staffing, governance, programming and service utilization and trends, civic engagement, emergency response, school enrollment and performance, and accessibility for disabled residents. Opportunities for shared intermunicipal services and facilities/infrastructure will be explored where appropriate.

Transportation and Circulation: The transportation and circulation chapter will provide an inventory of existing and proposed circulation and transportation systems. CMRPC will assess traffic counts, safety (crash locations), sidewalk, bicycle, freight, and transit/paratransit data to identify Grafton’s transportation strengths and weaknesses. The project team will consider how these factors affect and are affected by demographics such as poverty, race, lifecycle (age), and access to a vehicle, as well as the local and subregional retail, industrial, and commercial markets. A comparison of current and future socio-economic trends will be done to understand the tie between land use and transportation. This will help determine current and future trip making patterns, daytime/nighttime population, and roadway traffic conditions to help determine residents trip making behavior and roadway congestion in the quickly changing physical, technological, and regulatory landscape.

Quality of Life: The quality-of-life chapter will concern health, wellness, and other factor that affect well-being. This chapter will explore the causes of local wellness issues. It will provide strategies concerning promoting healthy lifestyles, strengthening behavioral health services, preventing chronic diseases, promoting safe school environments and healthy behaviors, ensuring access to health care, and other issues identified during data analysis and community engagement. CMRPC will work to identify gaps and challenges and provide strategies to help foster equitable outcomes.

Phase II Budget

Phase II Tasks	
Task 1: Project administration and management	\$4,225
Task 2: Preliminary kickoff meeting (1 meeting)	\$925
Task 3: Stakeholder interviews (10+ meetings)	\$2,275
Task 4: Public workshops (2 meetings)	\$5,550
Task 5: Chapter development	\$22,875
Task 6: Presentation of findings/ draft (2 meetings)	\$4,050
Task 7: Revisions and comments	\$6,450
Task 8: Staff-level meetings (5+ meetings)	\$1,900
Task 9: Other (printing, software, data, website, misc.)	\$1,500
Task 10: Travel	\$250
Total	\$50,000

Phase III

Phase III Scope of Work

CMRPC proposes to assist the Town of Grafton in the development of its Master Plan by providing the following Phase II services:

- Development of the Final Plan
- Implementation Plan

Development of the Final Plan

Phase III will focus on finalization of conclusions and recommendations, creation of an actionable plan for implementation, and development of all non-chapter elements (e.g., executive summary, preface, methodology, introduction, cover pages, appendices, etc.). It will entail refinement of the rough chapters developed in Phase II, and include photography, videography, design, layout, and publication. Phase III will also include development of an online summary plan (“Story Map”) and access to the branded website and domain name (developed and launched in Phase II) until January 2025.

This final phase will include two public meetings: a Preliminary Kickoff Meeting and Presentation of Final Draft. CMRPC will work with staff and the Planning Board to finalize plan deliverables and identify implementation priorities, costs, resources, and responsible parties. Additional community engagement will be conducted as needed to inform recommendations, clarify existing conditions, and finalize the plan. Boards and staff will again be a focus of engagement. The project team will circulate the final plan deliverables to relevant staff, boards, and commissions for their preliminary feedback, and revise the final deliverables accordingly. Following review of the deliverables by the Planning Board, the project team will hold the Presentation of Final Draft of the plan. CMRPC will work with the Town to promote these meetings to the public. Any final comments or revisions identified at this meeting will be promptly addressed and revised.

CMRPC will print six (6) copies of the primary Master Plan document, and one (1) copy of the plan Appendices. The Town will receive an electronic copy of the plan in PDF format. Additional printed copies of the plan can be added to the scope at cost. Similarly, the Town can extend access to the branded website and domain name at cost.

Implementation Plan

CMRPC will develop an actionable Implementation Plan that will be incorporated into the final Master Plan. The Implementation Plan will assist the Town of Grafton in achieving the goals, objectives, and recommendations of the updated Master Plan. The Implementation Plan will:

- Based upon direction of the Town of Grafton, as well as input received from public meetings and throughout the planning process, identify conflicts and/or potential issues between the various master plan chapters, and prioritize the set of actions and recommendations relative to each Master Plan element.

- Develop a short (within 1-3 years), mid-term (3-5 years), and long-term (5+ years) phased action plan to implement recommended programs and policies for each Plan element based upon the plan’s identified goals and objectives.
- Identify a schedule for potential changes to the Grafton zoning bylaw and other local land use regulations (e.g., subdivision regulations) based on the regulatory assessment conducted in the Land Use and other plan elements.
- Prepare a schedule, in the form of a Gantt chart, of all recommendations, including capital improvements, with a range of potential costs and potential revenue sources (including various grant sources). The schedule of recommendations will identify those actions items that can be implemented with minimal resources. CMRPC will rank these based on the timeframe identified in Step #2 and for the least impact on the Town’s budget.
- Identify entities (including those entities outside of the Town of Grafton governmental structure) responsible for implementation of specific plan element recommendations and discuss with each entity a process for determining coordination of implementation. The final text will include an implementation coordination plan.
- Develop recommendations for the Town to adopt a process to ensure regular review and updates regarding the status of implementation for the various Master Plan element goals and action items. CMRPC will recommend the Town of Grafton create a Master Plan Implementation Committee once the Master Plan is adopted. The Master Plan Implementation Committee will report regularly to the Planning Board, Town Administrator, and the Board of Selectmen and prepare an annual progress report to the Town.

Phase III Budget

Phase III Tasks	Cost
Task 1: Project administration and management	\$1,500
Task 2: Preliminary kickoff meeting (1 meeting)	\$1,000
Task 3: Implementation Plan development	\$5,000
Task 4: Photography and videography	\$2,500
Task 5: Plan development and finalization (non-chapter elements, layout and design, finalization of all text and narratives)	\$10,000
Task 6: Online summary plan	\$2,500
Task 7: Presentation of final draft (1 meeting)	\$1,850
Task 8: Revisions and comments	\$4,500
Task 9: Final deliverables	\$3,700
Task 10: Printing (6 copies of primary plan, 1 copy of appendices)	\$650
Task 11: Other (software, website through January 2025, misc.)	\$1,500
Task 12: Travel	\$300
Total	\$35,000

Contract Manager

Trish Settles, Deputy Director, RCCP

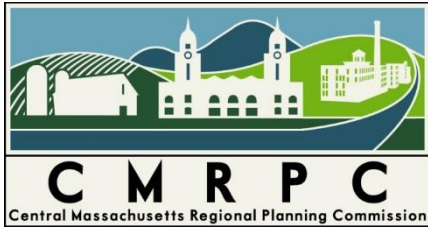
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AGREEMENT BY AND BETWEEN:
THE CENTRAL MASSACHUSETTS REGIONAL PLANNING COMMISSION
AND
THE TOWN OF GRAFTON

“Master Plan Update Phase 2”

THE AGREEMENT is made and entered into this _____ day of _____ 2023, by and between the Central Massachusetts Regional Planning Commission, herein referred to as “CMRPC” and the Town of GRAFTON, herein referred to as the “Town”.

WHEREAS, CMRPC is eligible to undertake and provide planning assistance under Chapter 40B of the Massachusetts General Laws, and;

WHEREAS, the Town of GRAFTON has appropriated funds to support its Master Plan Update as per the requirements of MGL Chapter 41, Section 81D; and

WHEREAS, CMRPC provided a Scope of Service for Phases 2 and 3 on December 30, 2022 in response to request of the Town and following successful completion of Phase 1 of the Master Plan Update (Data Collection) (Contract dated June 30, 2022) for the Town of Grafton, Massachusetts. We issue this contract to provide the services of only Phase 2 described in that Scope of Service, included as part of this contract as Attachment A. A separate contract will be created for Phase 3, pending authorization of funding.

WHEREAS, the Town of Grafton wants to continue to have a current Master Plan that incorporates community concerns and needs as well as challenges and threats. CMRPC understands that it is of utmost importance to engage a variety of stakeholders in these conversations. The Town anticipates updating its Master Plan with a phased approach. This project will incorporate items from Phase 1 as well as those items described in Phase 2 of the Scope of Services. This contract acknowledges that funds are available for Phase 2 in the amount

of \$50,000 and that funds be expected for phase 3 in the future. A separate contract will be developed when those funds can be affirmatively authorized by the Town Accountant.

NOW, THEREFORE, the Town and CMRPC do mutually agree as follows:

I. EMPLOYMENT OF CMRPC

The Town agrees to employ CMRPC for such technical and professional services as are set forth in this Contract and described in ATTACHMENT A – Scope of Service for Phase 2 (\$50,000), and CMRPC agrees to provide said services, as requested by the Town. Phase 3, though indicated in the Scope of Service will be authorized with a separate contract.

II. SCOPE OF SERVICES

The specific tasks associated with Phase 2 that CMRPC will provide are denoted in ATTACHMENT A. Should additional services be required, CMRPC and the Town will negotiate a new contract, or a contract amendment based on available CMRPC resources.

III. COMPENSATION/PROJECT COSTS

CMRPC's services shall be provided based on the Scope of Service. Costs to the Town associated with CMRPC's proposal will not exceed \$50,000 for Phase 2. The final payment will be due within 30 days of the transmittal of the final deliverable, but no later than January 30, 2024, unless this contract is amended. CMRPC's professional fee (\$50,000) includes all related expenses and will be paid as described in Section IV. METHOD OF PAYMENT.

IV. METHOD OF PAYMENT

CMRPC shall submit invoices on a substantial completion of milestones as described below and in ATTACHMENT A.

Phase 2:

- Milestone 1 \$25,000 (50% Completion): On or about June 30, 2023, following completion of Workshop 1.
- Milestone 2 \$25,000 (100% Completion): On or about December 31, 2023, upon delivery of a Presentation of Findings in rough draft chapter form.

The final payment will be due within 30 days of the transmittal of the final deliverable, but no later than January 30, 2024, unless this contract is amended.

CMRPC shall submit invoices to the Town via either mail or email to the following individual/office requesting payment for services following the substantial completion of key project milestones outlined above:

Evan Brassard, Town Administrator
Town of Grafton
30 Providence Road
Grafton, MA 01519
508-839-5335 x1180
brassarde@grafton-ma.gov

V. NOTICE OF TERMINATION OF AGREEMENT

This contract will expire on December 31, 2023, unless either party desires to terminate or to extend. Two (2) weeks' notice by regular mail will be provided should either party wish or require to terminate not for cause.

VI. TERMINATION OF AGREEMENT FOR CAUSE

If through any cause, CMRPC or the Town shall fail to meet in a timely and proper manner its obligations under this Agreement, or violates any of the stipulations of this contract, the other party shall thereupon have the right to terminate this Agreement by submitting written notice to the party in violation of such termination and specify the effective date thereof at least ten (10) working days prior to the effective date of termination notice. This agreement may be extended by mutual agreement of both parties and a signed contract amendment.

VII. INDEMNIFICATION

The Parties agree to individually assume responsibility for any and all claims, losses, or liability, arising from injury or death to persons or damage to property occasioned by any act, omission or failure of itself, officers, agents, and employees, relating to this Agreement. The Parties further agree to hold each other harmless from such claims to the extent permitted by law.

VIII. NOTICES

Any notices, payments, bills, invoices, or reports required by this agreement shall be sufficient if sent by the Town hereto by United States mail or private mail carrier, postage paid, or electronic transmittal to the address noted below:

