

# **Town of Windsor Plan of Conservation and Development Update Request for Qualifications**

## **Introduction**

The Town of Windsor (approximate population of 29,453) is requesting qualifications to provide professional services to lead the review and update of Town of Windsor's Plan of Conservation and Development (POCD) adopted in 2015 in compliance with CGS Section 8-23. The selected consultant will articulate a community vision through 2035 and beyond, and establish specific goals, policies, and actions needed to achieve that vision. To develop this document, the selected consultant will review relevant plans, codes, ordinances, policies, and other relevant documents. The selected firm will work closely with Town of Windsor staff, boards, and commissions on this project.

It is anticipated that the community planning process will be inclusive, engaging with a working group that will be comprised of representatives of the Planning and Zoning Commission plus representatives of appointed boards such as the Inland Wetlands and Watercourses Commission, Conservation Commission, Historic District Commission, Economic Development Commission, and other community stakeholders. The Town Planner will provide primary support for this project with assistance from members of the Town's Development Team. The selected consultant will assign one qualified individual, who will be the firm's day-to-day contact person and who will be responsible for directing and coordinating the activities of the firm's personnel in all aspects of the project.

The updated Plan should address all statutory requirements, with particular emphasis on:

- Natural resources and historic resources,
- Open space planning,
- Diversity in housing choices including affordable housing,
- Transportation systems including roads, sidewalks, multi-purpose trails and other public ways,
- Energy efficient development patterns, "green" development, and renewable forms of energy and energy conservation,
- Economic development goals including multi-family residential, commercial, and industrial land uses in terms of the tax base necessary to support town services, and
- Community facilities.

## **Community Background**

Located in north-central Connecticut, Windsor is strategically located between Hartford, CT and Springfield, MA and roughly midway between Boston and New York. The oldest settled town in Connecticut, Windsor is a diverse community, which stems from its variety of housing options, broad commercial base, racial and ethnic mix of residents, and varied character, ranging from historic to modern and rural to urban. Windsor is also amenity-rich due to its unparalleled

transportation facilities, excellent community facilities, ubiquitous public utilities, wide variety of cultural facilities/events, abundant natural/scenic resources, and rich heritage.

## **Proposal Submission Requirements**

### **A. Submission Deadline**

An unbound original plus five (5) copies shall be received by the Windsor Planning Department, 275 Broad Street, Windsor, CT 06095 by Wednesday, August 23, 2024 at 5 p.m. Responses received after the RFQ submittal due date and time are late and shall not be considered.

### **B. Letter of Transmittal**

A cover letter signed by an authorized representative of the firm briefly outlining the firm's understanding of the work. The cover letter must contain a commitment to provide the services described and the name, address, telephone number, and email of the consultant's primary contact person.

### **C. Qualification of Firm(s)**

List the names of the anticipated project manager and other key personnel associated with the project. A resume of their qualifications and experience should be attached along with the percentage of time each person is anticipated to devote to the project. The successful firm is expected to have a high level of familiarity with communities with similar characteristics to Windsor.

Describe the name and location of any sub-consulting firms that will be used by the firm. Please identify the approximate percentage of work that would be performed by each of these firms. Include the experience and qualifications of the sub-consultant firm and their key personnel in working on similar projects.

Describe the experience of the firm in conducting similar projects. Identify previous projects with similar budgets and deadlines and whether the firm met the established criteria.

Include a project list with client contacts for no more than five similar projects that have been completed in the past five years. Identify the key personnel who worked on the referenced projects.

Describe the firm's prior experience in working on multi-stakeholder projects, particularly made up of town representatives as well as representatives from partner organizations, property owners, and neighborhood residents or other public representatives.

Describe the firm's ability to integrate this project into the firm's present workload.

Describe the firm's public engagement experience and provide 3 contacts for projects with engagement similar to what you anticipate.

#### D. Scope of Services

The selected consultant will assist the Town of Windsor in the review and update of our 2015 POCD to address rapidly changing conditions since the plan's adoption. This update will also review growth trends, update and improve applicable visuals, and provide updated data and figures. The POCD update project is expected to be completed in 12 months. The consultant responsibilities and deliverables listed below provide more detailed information on this project.

#### E. Consultant Responsibilities

The selected consultant will be responsible for the following items:

##### 1. Project Initiation and Management

- Conduct an initial meeting with town officials to outline project objectives, timelines, and deliverables.
- Establish a project management plan, including a communication plan, timeline, and roles and responsibilities.

##### 2. Community Engagement and Stakeholder Involvement

- Design and implement a comprehensive, multi-faceted public outreach and a participatory process to ensure appropriate stakeholder involvement and gather community input.

##### 3. Data Collection and Analysis

- Analyze current and emerging forces (e.g. economic, demographic) shaping Windsor's future to inform the development of the POCD.
- Collect and analyze relevant data on demographics, land use, housing, economic development, natural resources, transportation, public facilities, housing, and other relevant topics.

##### 4. Review Existing Plans and Regulations

- Assess the current POCD's effectiveness in achieving its goals and objectives.

- Review existing plans such as the Windsor Center Transit Oriented Development Master Plan and Affordable Housing Plan, as well as regulations to ensure consistency and identify areas for alignment or revision.

## 5. Vision and Goal Setting

- Develop a clear and shared vision for the future of Windsor that incorporates the values and preferences expressed by community stakeholders.
- Re-evaluate current priorities as set forth in the goals of the POCD and distill recommendations into broader, higher level goals and strategies.

## 6. Plan Development

- Prepare a draft POCD, including updated goals, strategies, and actions.
- Update relevant maps, graphs, and figures to reflect the most up-to-date data and create additional maps as necessary.
- Note inconsistencies, if any, with state growth management principles.
- Provide recommendations for monitoring and updating the POCD.

## 7. Public Review and Revision

- Present the draft POCD to the community for feedback through public meetings and online platforms.
- Revise the draft POCD based on public and stakeholder input.

## 8. Final Plan and adoption

- Prepare the final POCD document, including all maps, appendices, and supporting materials.
- Assist the town in the process required to adopt the updated POCD, including public hearings and compliance with CGS Section 8-23.

## F. Deliverables

1. Presentation materials for public meetings and hearings.
2. Editable digital copies of all preliminary and final draft documents.
3. A community engagement summary report.
4. An executive summary for circulation to Town boards and commissions and for publication on the Town's website.
6. Digital copies of all the data used including GIS data obtained or created.

All draft and final documents delivered or utilized in a public setting to the Town of Windsor must comply with Section 508 of the Americans for Disability Act.

## G. Proposed Project Schedule

Emphasis will be placed upon selecting a qualified firm that demonstrates a clear understanding of the POCD update project. Provide a project schedule outlining the time and estimated completion date of the proposed scope of work. This should include a schedule for and description of all deliverable products throughout the period.

## H. Fees and Compensation

Provide a proposed budget for the completion of the scope of services with cost breakdowns by scope element. Quotation of fees and compensation shall remain firm for at least 90 days from the proposal submission deadline. The Town reserves the right to negotiate fees with the selected consultant.

## I. Submission Requirements

Respondents should describe their approach, team, community engagement strategy, project plan, budget, similar projects, and resources required from the Town. Information in the proposal must include:

1. Cover Page
2. Table of Contents
3. Statement of Non-discrimination
4. A description of the firm(s) history, expertise and experience with particular emphasis on those of a similar scope and scale.
5. A list of company employees assigned to this project, credentials for each, and references to relevant work experiences. Include anticipated work areas for each project team member, including an estimation of the percentage of time each referenced team member will spend on the project. If the respondent is a joint venture, identify the firm that will serve as the principal and the team members and qualifications of all partners/sub-contractors.
6. A clear public engagement strategy that meets the objectives identified in the scope of services.
7. An explanation of your approach to the project and key issues to be resolved.
8. A work program and schedule for each phase of the project.
9. A detailed budget for the project, broken down by task. This is anticipated to be modified upon refinement of the scope after the project is initiated.
10. A minimum of five references from governmental entities (may include municipal, county, state, or tribal governments), providing the following for each:
  - a. Name of entity/agency;

- b. Contact name, title, phone number, and email address;
- c. Project name, start and end dates;
- d. Summary of project;
- e. Links to work products completed; and
- f. Total Costs and Expenses

11. A disclosure regarding what other projects are currently underway and an assessment of staff time available for this project.

12. A list of resources or assistance needed from the Town of Windsor.

J. Evaluation Criteria

The following factors will be considered in evaluating responses:

1. Previous experience in the services required and overall qualifications of the consultant, including the relevant experience of key personnel to be assigned to the project.
2. The consultant’s understanding of and technical approach to the project.
3. Capabilities in community engagement and communications.
4. Demonstrated ability to perform on schedule and within budget.
5. Proposed fees and costs, although the Town is not bound to select the consultant who proposes the lowest fees.

K. Submission Schedule

RFQ Issuance and Distribution	July 26, 2024
Deadline for Submittal of Questions	August 9, 2024
Responses to Questions Published on Town Website	August 13, 2024
Submittal Deadline	August 23, 2024
Interviews with Shortlisted Consultants	Week of September 9, 2024
Select Consultant	Week of September 23, 2024
Commencement of Services	October 14, 2024
Completion of Final Draft POCD	August 2025
Public Hearing on POCD and Adoption	September 2025
POCD Effective	October 2025

L. Supplemental Information

1. Questions and Inquiries

All inquiries, questions, or requests for additional information related to this RFQ should be directed to Todd Sealy, Town Planner, at [sealy@townofwindsorct.com](mailto:sealy@townofwindsorct.com) by the Q&A Deadline of August 9, 2024. If any questions are submitted, a summary of the responses will be posted on the Town of Windsor website by August 13, 2024.

Any addendum deemed necessary prior to the submittal date will be posted on the Town of Windsor Website. It is the proposer's responsibility to assure receipt of all addenda, if any, received as part of their proposals.

## 2. Non-Discrimination

The Town of Windsor is committed to a community where all members feel a sense of belonging. We commit to recognizing the diversity of our community members, listening to ALL voices, and providing equitable services to create an inclusive place to live, play, and work. We believe EQUITY should be at the center of all our work. We strive to represent our community in our teammates, as we know that diverse and inclusive teams are more innovative, and have an empowering impact on the work, progress, and culture of our community. It takes us all working together.

## 3. Reservation of Rights

The Town of Windsor reserves the right to reject any or all proposals, to re-advertise, to waive any irregularities in the proposals, and to accept the proposal that best benefits the Town. The Town reserves the right to reject any response deemed unqualified, unsatisfactory, or inappropriate.

## 4. Public Records Act

All materials submitted in response to this RFQ will become the property of the Town of Windsor and will become part of the public record after the evaluation process is completed and an award decision made.

## 5. Lobbying

Prospective consultants are prohibited from lobbying the Town Planning and Zoning Commission, the Town Council, the Mayor, or members of the selection committee relative to the consultant's proposal in response to this RFQ.

## 6. Disclosure of Interest

The consultant is expected to fully disclose any potential conflicts of interest, whether they be actual, potential, or perceived.

## 7. Work Product & Ownership

All work performed, whether by consultant or sub-contractor, shall be the property of the Town of Windsor, including materials in raw or finished form. Work products must be provided to the Town of Windsor in formats compatible with applicable Microsoft Suite software and Adobe PDF software. All Geographic Information Systems data and files in ESRI compatible format shall be included in the work product and turned over to the Town of Windsor.

8. Compliance with the Town of Windsor Code of Ethics

No former town employee in administrative pay grade 3 or above and no former board of education employee in a cabinet level position or above shall work for a private firm who has a contract with the town any time within six months after terminating service with the town. If this occurs, the vendor could be subject to penalties up to and including contract termination.

9. Insurance

The selected consultant and any subcontractors shall comply with the insurance requirements in Attachment A.

**Note:** The Town of Windsor has also issued an RFQ for the Day Hill Corporate Area Study. Qualified Consultants are encourage to submit for both projects and should highlight any benefit and efficiencies that could be realized if one firm were to be awarded both projects. Two separate submissions (one for each RFQ) will still be required.



## ATTACHMENT A

### INSURANCE

CONSULTANT agrees to secure and protect itself and shall secure and indemnify the TOWN OF WINDSOR directors, officers and employees from any liability, claim of liability, expense, cause of action, loss or damage whatsoever for any injury including death to any person or property in the performance of this Agreement directly resulting from the negligence of CONSULTANT. CONSULTANT agrees to carry as a minimum the following insurance in such form and with such carriers as are satisfactory to the TOWN OF WINDSOR covering all Services to be performed under this Agreement:

After executing this Agreement, but prior to starting the Services, the CONSULTANT shall furnish Certificates of Insurance, including Automobile, Commercial General Liability, Umbrella Liability, and Worker's Compensation insurance in the following amounts:

1. Commercial General Liability Insurance:

The CONSULTANT shall provide Commercial General Liability insurance with a combined single limit of \$1,000,000 per occurrence, \$1,000,000 aggregate for bodily injury and property damage.

The CGL shall be written on ISO occurrence form CG 00 01 10 93 (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal injury and advertising injury, and liability assumed under an insured contract (including the tort liability of another assumed in a business contract)

2. Commercial Automobile Liability Insurance

The CONSULTANT shall provide Commercial Automobile Liability insurance with a combined single limit of \$1,000,000 per occurrence, \$1,000,000 aggregate, and shall include coverage for all owned, hired, and non-owned vehicles.

3. Worker's Compensation Insurance

The CONSULTANT shall provide Worker's Compensation Insurance in the required amount as applies to the State of Connecticut and Employers Liability Insurance as follows:

Bodily Injury by Accident - \$100,000 each accident  
Bodily Injury by Disease - \$500,000 policy limit  
Bodily Injury by Disease - \$100,000 each employee

#### 4. Umbrella Liability Insurance

The CONSULTANT shall provide Commercial Umbrella Liability insurance with a combined single limit of \$1,000,000 per occurrence, \$1,000,000 aggregate for bodily injury and property damage.

Each Policy of Insurance shall include a waiver of subrogation in favor of the TOWN OF WINDSOR and shall provide no less than thirty (30) days' notice to the TOWN OF WINDSOR in the event of a cancellation or change in conditions or amounts of coverage. The Commercial General Liability, Automobile and Umbrella Liability shall name the TOWN OF WINDSOR as an additional insured.

Certificates of Insurance, acceptable to the TOWN OF WINDSOR shall be delivered to the TOWN OF WINDSOR prior to the commencement of the Services and kept in force throughout the term hereof.

The above insurance requirements shall also apply to all Subcontractors and the CONSULTANT shall not allow any Subcontractor to commence work until the Subcontractor's insurance has been so obtained and approved.

#### **INDEMNIFICATION**

The CONSULTANT shall indemnify and hold harmless the TOWN OF WINDSOR and its agents and employees from and against all claims, damages, losses and expenses, including attorney's fees resulting from the negligent performance of the work.

#### **SUBCONTRACTORS**

Should the CONSULTANT elect to use Subcontractors for work associated with executing the Services, the CONSULTANT shall present to the TOWN OF WINDSOR the name of the Subcontractor(s), the work the Subcontractor is expected to perform, and submit copies of the Subcontractor's insurance which shall conform to those insurance requirements outlined above. The TOWN OF WINDSOR reserves the right to reject a Subcontractor submitted for approval. The CONSULTANT will be fully responsible for all acts and omissions of Subcontractors or persons directly or indirectly employed by them, and of persons whose acts, any of them, may be liable to the same extent that he is responsible for acts and omissions directly employed by him.