



REQUEST FOR QUALIFICATIONS & PROPOSALS

RFP- Monroe 2020 POCD Update

Request for Qualifications & Proposals for
Professional Planning Consultant Services

[LINK TO RFP ON MONROE WEBSITE](#)

RESPONSE DEADLINE – MARCH 25, 2019 – 3:00 PM

**TOWN OF MONROE, FAIRFIELD COUNTY, CONNECTICUT
2020 UPDATE – PLAN OF CONSERVATION AND DEVELOPMENT**

**Office of the First Selectman
7 Fan Hill Road
Monroe, CT 06468**

Date of Issuance: February 6, 2019

No right shall accrue to any person submitting a bid until such bids have been accepted and a contract awarded in writing by the duly authorized representative of the Town of Monroe (“Town”). The Town reserves the right to reject any and all bids and to accept the lowest responsible bidder, and to waive any informalities, omissions, excess verbiage, or technical defects in the Bidding, if, in the opinion of the Town, it would in the their best interest to do so.

This RFP is issued in compliance with the Town’s purchasing policy allowing a Qualifications Based Selection (“QBS”) process for the selection of professional services and whereby the Town reserves the right to further negotiate scope and fees after determining those proposals that demonstrate the qualifications, quality of work, experience of personnel, and ability to perform the services to meet the Town’s needs and in the Town’s sole and absolute discretion. The use of the term “RFP” in this document shall incorporate the QBS process and fee proposals submitted shall be considered preliminary and subject to further negotiation.

TOWN OF MONROE, FAIRFIELD COUNTY, CONNECTICUT 2020 UPDATE – PLAN OF CONSERVATION AND DEVELOPMENT

RFP: PROFESSIONAL PLANNING CONSULTANT SERVICES

The Town of Monroe (Town) located in Fairfield County, Connecticut is accepting “proposals” from qualified professional planning consultants to assist with the review and update of the Town’s existing [2010 Plan of Conservation and Development](#) (“POCD”). The Town welcomes proposals demonstrating the qualifications and expertise to undertake the “**2020 POCD Update**” in accordance with statutory requirements and the services outlined herein. The selected consultant, specifically the individual(s) assigned to directly interact and provide the services to the Town, shall have extensive and specific understanding, technical knowledge, and experience in the organization, drafting and implementation of a municipal POCD. In addition, interested consultants shall demonstrate extensive experience in the design and effective execution of community engagement and public participatory efforts related to municipal planning initiatives.

The existing POCD was the result of a comprehensive planning process and includes a series of goals, associated policies and implementation strategies. The existing POCD remains both an informative and relevant document, and serves as an important planning guide for the Town. As such, it is the preference of the Town to strategically update the POCD in a succinct, innovative and user-friendly approach that identifies the community's current vision and goals.

OUTLINE OF REQUESTED CONSULTANT SERVICES

SCOPE OF SERVICES TO BE PROVIDED

The 2020 POCD Update is to include the following minimum components (noting that a detailed scope of services and list of deliverables will be determined at time of contract with the selected consultant) consistent with the provisions of Connecticut General Statutes §8-23:

- **Data Update and Assessment:** Review, update and add relevant data, addressing but not limited to demographics, sustainability, housing, economic development, transportation, historic preservation, utilities, open space, land use and other trending municipal planning data and information. All relevant mapping is to be updated, expanded upon, and provided in a format compatible for incorporation to the Town’s GIS. Plans, studies, reports, and projects pertaining to conservation, development, land use, zoning, inland wetlands, regulatory changes and amendments since the adoption of the 2010 POCD by the Town, State and MetroCOG, as well as relevant changes in State and Federal laws, policies and procedures, are to be reviewed and included or referenced where appropriate.
- **Community Engagement and Public Participatory Process:** The proposal will outline proposed community engagement and public participatory efforts which are both time efficient and cost conscience while being innovative to maximize community participation and facilitate consensus building.

- **2020 POCD Update:** The update will include the review, refinement and incorporation of new recommendations to the current POCD's goals, policies and strategies, as well as updated related data, tables, graphics, and mapping to support such. The intent is to conduct a focused update, the definition of which shall be among the first tasks to be completed by the consultant. Initial update focus (not inclusive list) is to address:
 - Evaluation of existing commercial zoning along the Main Street (Route 25) and Monroe Turnpike (Route 111) corridors to identify opportunities for increased economic development through appropriate commercial zone expansions, zone consolidations and/or zone changes.
 - Evaluation of the current state of commercial uses and occupancies along the Main Street (Route 25) and Monroe Turnpike (Route 111) corridors to identify opportunities and potential modifications to the current land use focus of the underlying Zoning Districts and permitted land uses in response to emerging trends and shifting regional retail / personal service landscape and markets.
 - Building on the recommendations of the 2010 POCD, area specific evaluation of potential for Priority Growth Area and/or Village District designation within the Town, particularly for the Stepney area centered at the intersection of Main Street (Route 25 and) and Easton Road (Route 59).
 - Evaluation of opportunities for mixed-use development which fosters and engages residential and commercial development in a coherent and integrated site design pattern, whereby walkability dominates over the automobile.
 - Evaluation of former Stevenson Lumber property and surrounding area to identify potential redevelopment opportunities.
 - Consideration of potential repurposing of the former Chalk Hill School building/property, consistent with the findings from the Town's Municipal space Needs Assessment which is a parallel effort.
 - Expansion of GIS based data and maps to assist long term planning; permit reviews; and expansion of current open space planning efforts.
 - Identification of trending and emerging land uses and regulatory (zoning, subdivision, stormwater, LID, inland wetlands, etc) techniques with recommendation for integration where deemed compatible.
 - Review of existing Town Regulations and Code Ordinances (Zoning, Subdivision, Inland Wetlands, Building Construction, Street Specifications, etc) and recommendations of requirements and techniques advancing LID and stormwater management measures providing advancement of MS4 compliance.
 - Focused attention and concentration on attainable implementation strategies, providing greater guidance and direction on specific implementation steps and implementation time line to achieve POCD recommendations in a timely and financially prudent manner.

WORK SCHEDULE

The proposal is to include a projected schedule outlining the phases of the update process through to public hearing and adoption. Adoption of POCD Update is anticipated no later than eighteen (18) months of contract award. The work is intended to be highly hands-on with the Commission and Town Staff. During the course of service, bimonthly updates (more or less) are envisioned to ensure the coordination and timely completion of the 2020 POCD Update.

BUDGET

The proposal is to include a projected budget tied to the projected schedule, and which shall include the identification of deliverables. The Town will not be held responsible for any costs incurred for work performed in preparation and production of a proposal, or for any work performed prior to the issuance of a contract.

RFP RESPONSE SUBMISSION CONTENT and ORGANIZATION

All proposals in response to this RFP shall include the following minimum information and shall be presented in the following uniform format and organization:

A. Consultant

- Provide background and experience of the Consultant (summarize in narrative and include Statement of Qualifications promotional material as an attachment).
- Identify specific personnel to be assigned and their related experience. The lead project manager shall be a Certified Planner (AICP) with appropriate years of experience in master plans for communities similar to Monroe.
- Company Information:
 - Name of Company and Parent Company, if any.
 - Legal form of ownership. If a corporation, where incorporated.
 - Description of the firm; years engaged in services under present name.
 - Address and contact information of principal office and office from which this work will be managed.
 - Name, titles, reporting relationships, background and experience of the principal members of the company, including officers.
 - Indicate which individuals are authorized to bind the company in negotiations with the Town of Monroe.
 - Name, address, direct telephone, email address of the principal contact person to receive notifications and to reply to inquiries from Town Staff.
 - Conflicts – Note any believed or anticipated conflicts of interest.
 - Litigation – Describe any litigation, including arbitration proceedings (past and present), involving your company.
 - Default – Has the company ever failed to complete any work awarded? Has the company ever defaulted on a contract or been notified of a default by a client? If so where and why?

B. Prior and Current Experience

- Provide examples of previous work completed in the last five (5) years on similar POCD type projects demonstrating the consultant's understanding and expertise in managing and completing the POCD process.
- Provide a project organizational chart and resumes of the specific persons to be assigned and their responsibilities.
- Demonstrate the assigned personnel's education, knowledge and recent experiences performing the services as requested by this RFP, as well as their solid understanding with implementation measures and applicable regulatory tools.
- Demonstrate proficiency with GIS compatible to Town resources and other related software tools to be used in the preparation of the POCD Update and to ensure smooth integration to existing Town capabilities.

C. Local Knowledge

- Provide extent of local knowledge of Monroe and/or communities experiencing similar characteristics, development patterns and issues.

D. Narrative

- Statement of overall approach to complete the 2020 POCD Update.
- Detailed scope of services, including proposed community participation efforts.
- Anticipated schedule, noting milestone steps throughout the process.
- List of deliverables.

E. References

- Provide a list of at least five (5) similar previous and current contracts, including:
 - Brief description of each project.
 - Primary personnel that was assigned.
 - Reference Contact: name, telephone and email.

F. Cost Proposal

- Provide a fee structure for all work and meetings proposed to be provided.
- Lump sum fees shall specify work included, and any exclusions and add-ons.
- Hourly fees shall list all personnel to be assigned, including any additional or reimbursable expense costs.
- Attach a copy of a current company Rate Schedule.
- All proposed fee structures will serve as the basis for negotiation of a Final Contract. The Town reserves the right to select, reject or negotiate modification of any submitted proposal.

G. Additional Information

- Include additional information as deemed relevant or which will make your RFP response stand out from others.

RFP RESPONSE SUBMISSION TIMELINE and PROCESS

RFP QUESTIONS [CLICK HERE TO LINK TO RFP PAGE ON MONROE WEBSITE](#)

The 2020 POCD Update will be completed at the direction of the Town Planning and Zoning Commission. All technical questions regarding this RFP must be in writing and received by the date and time noted below. The Town is not responsible for transmission issues, errors, or delays. Responses to questions will be provided only to those directed as follows:

Tanya Bombero, Administrative Assistant to First Selectman – TBombero@monroect.org

- Deadline for submitting questions related to this RFP is **1:30 PM, MARCH 1, 2019**.
- RFP Amendment(s) responding to questions will be issued through **MARCH 8, 2019**.

All questions will be reviewed and a response provided via email, to the extent possible, no later than as noted above. All prospective respondents will receive answers in writing to all questions submitted. It is the responsibility of each respondent to ensure they have received such responses. Any oral responses shall not be considered as responses from the Town of Monroe. No alleged “verbal interpretation” shall be held valid. The Town reserves the right to consolidate similar questions into a single response.

RFP SUBMISSION DEADLINE **3:00 PM — MARCH 25, 2019**

Bid submissions must be received no later than the above date and time (“Response Date”) to be considered. Actual receipt is required by that time. Deposit in the mail is not sufficient. No submissions may be accepted or withdrawn after this deadline. The party submitting a response to this RFP shall be solely responsible for timely delivery. Unsigned proposals shall not be considered. There will be no acceptance of late proposals and the Town of Monroe will not accept any responsibility for a late filing for any person and/or entity responding to this RFP. The consultant submitting a sealed bid (proposal) in response to this RFP shall be an authorized principal or agent, authorized by the organization to contractually bind the organization with regard to price and related contractual obligations.

Correction, modification or withdrawal of a proposal may be made by sealed written notice, clearly marked as a correction, modification, or withdrawal, and received by the Town (c/o of the First Selectman's Office) prior to the time and date set forth for proposal submission. No proposal may be submitted or withdrawn after the submission deadline. Any proposal received after the date and time prescribed shall not be considered for contract award and shall be returned to the proposer. Neither faxed nor emailed RFP responses will be accepted as a qualified RFP submission.

The Town will not open the proposals received prior to the close of the submission deadline (or such date should same be extended by the Town). The Town will not disclose any portion of the proposals except to members of the proposal evaluation team prior to contract award. The Town retains the right to disclose the name of all proposers, the financial considerations and any other information in the proposals pertinent to the selection of a preferred consultant.

FORMAT **Ten (10) Hardcopies & One (1) Electronic CD/DVD Copy**

Bids shall be in a sealed envelope or package clearly marked and addressed as follows:

**Office of the First Selectman
7 Fan Hill Road
Monroe, CT 06468**

- **Monroe 2020 POCD Update – Proposal to RFP**
- **{Name and Address of the Consultant making the Proposal}**

No oral, telephone or telegraphic responses will be considered. The Town reserves the right to communicate with any or all of the respondents to clarify the provisions of their proposals. The Town further reserves the right to request additional information from any respondent at any time after the proposals are opened.

RFP RESPONSES EVALUATION PROCESS

INTERVIEW PROCESS

All timely received proposals will be evaluated internally by the Town. Interviews will be scheduled and held during **APRIL 2019**. Depending upon the number of submissions, the list of consultants may be reduced to a “Short List” for the purpose of interview and selection, which may include more than one interview. The Town reserves the right to reopen the process should it find that additional candidates are desired.

SELECTION CRITERIA

The following selection criteria will be used in evaluating respondent proposals:

- Demonstrated understanding of the requirements of the 2020 POCD Update.
- Clarity and comprehensiveness of project approach and schedule.
- Breadth and quality of previous experiences relative to the services requested.
- Overall qualifications of the personnel assigned.
- Shown ability to provide the requested services in a timely manner.
- Comments and opinions of references.
- Reasonableness and competitiveness of preliminary fee proposal.
- Demonstration of familiarity with applicable Connecticut State Statutes, as well as Zoning, Subdivision and Inland Wetlands Regulations.
- Ability of firm’s resources required to complete the 2020 POCD Update.

The successful “Bidder” must execute a contract with the Town of Monroe. Selection and a final contract are desired to be completed prior to the end of **MAY 2019** to maximize work time prior to the anticipated time of adoption. The contract shall not be considered awarded until such time as the Monroe Town Council authorizes the First Selectman to execute any agreement. The Planning and Zoning Commission and its Staff will manage the successful Bidder during the project to ensure project milestones and deliverables are met.

The successful Bidder shall have no authority to assign or subcontract any portion of the contract without prior written permission of the Town. Prior to awarding any contract, the Town reserves the right to interview and request a presentation from any respondent based upon the proposals received. This RFP is only a solicitation for information. The Town is not obligated to enter into a contract nor is it responsible for any costs associated with the preparation or proposals and interviews. Proposals received after the deadline will be disqualified from consideration. The Town reserves the right to pursue or reject any and all proposals, in whole or in part, to give preference to local businesses, and to pursue any proposal deemed to be in the best interests of the Town. The Town is not under any obligation to award to the lowest priced response. The Town shall reserve rights to amend or to terminate the RFP at its sole discretion, and at any time.

TERMS AND CONDITIONS

BIDDER REPRESENTATIONS

With its submission of a proposal, each respondent shall affirmatively represent the following:

- The Bidder understands the requirements of the RFP and the work requested.
- The proposal is based upon the services, materials, equipment and systems required by the RFP without exception or qualification, except as expressly stated in the proposal.
- The Bidder is familiar with local conditions under which the services are to be performed and has correlated the Bidder’s personal observations with the requirements of the RFP.
- The Bidder has not colluded with any other person in regard to any proposal submitted.
- The Bidder is not barred from proposing or performing work in any jurisdiction.
- The proposal is made in conformance with the RFP.
- Unless otherwise required by law, the fees for services in their proposal have not been knowingly disclosed by the Bidder and will not knowingly be disclosed by the Bidder prior to award, directly or indirectly to any other bidder or person.
- No attempt has been made or will be made to induce any other person or firm to submit or not to submit an offer for the purpose of restricting competition.
- No elected official or appointed official or employee of the Town shall benefit directly or indirectly financially or materially from a contract if so awarded.

FREEDOM OF INFORMATION

The Town will not be liable for any costs incurred in the preparation of the response to this RFP. All proposal submissions and materials shall become the property of the Town and will not be returned. Respondents to this RFP are hereby notified that all proposals submitted and information contained therein, and attached thereto shall be subject to disclosure under the Freedom of Information Act.

HOLD HARMLESS

Should a contract be awarded, the Town of Monroe will require the successful Bidder to agree to defend, indemnify and hold harmless the Town of Monroe and their municipal officers, directors, employees and agents for, from and against, any claim, loss liability, cost and expense for bodily injury and property damage including reasonable attorney's fees, court costs and expert witness fees, directly or indirectly relating to, resulting from or arising out of such Contract with them. This indemnification shall not be effective as to any loss attributable exclusively to the negligence or willful act or omission of the Town of Monroe and/or their officers, directors, employees and agents.

INSURANCE

The selected Bidder is required to furnish a Certificate of Insurance naming the Town of Monroe as an additional insured. The insurance is to include Contractor's Liability and Worker's Compensation sufficient to hold the Town of Monroe harmless from all eventualities that may occur relative to this Proposal and resulting purchase order or Contract/Agreement. The Certificates of Insurance shall be provided by companies licensed in the State of Connecticut and shall be in amounts of one million (\$1,000,000) dollars General Aggregate, one million (\$1,000,000) dollars Automobile Liability and Worker's Compensation, and one million (\$1,000,000) dollars Employer's Liability (each accident) to the Town of Monroe. It is understood that the Contractor shall not change the terms and conditions of such insurance policy except upon the prior written approval of the Town, which approval shall not be unreasonably withheld, provided that the consultant or contractor shall cease all operations on or before the effective date of said cancellation and he or she shall not commence work again until replacement insurance has been obtained and delivered a Certificate of Insurance to the Office of the First Selectman. The selected Bidder shall also deliver to the Town proof of professional liability insurance in the sum of one million (\$1,000,000) dollars each claim, issued by a reputable insurance company licensed in the State of Connecticut. This insurance must be maintained throughout the engagement, including tail coverage if applicable, and proof thereof must be provided upon request. Cancellation or changes to this insurance shall also be restricted to the requirements/notice procedures as stated above. **Each respondent shall indicate either their ability or inability to comply with these insurance requirements in their bid proposal.**

MULTIPLE ENTITIES

If two or more legal entities are collaborating to submit a proposal, the Town expects that the proposal will be submitted in the name of only one entity and any contract resulting from such proposal will be between the Town and the proposing legal entity, only. Include the legal name of the proposing Bidder and any collaborating entities, as well as a description of the relationship between them. If, in order to accept the proposal, the Town would be legally required to enter into a contract with more than one legal entity, please describe the proposed structure in the bid proposal.

ACKNOWLEDGEMENT

Proposals must be signed by an authorized representative of the proposing Bidder, identified by name and title, with an acknowledgement to include that the proposal will be valid for a period of not less than one hundred fifty (150) days from the Response Date.

CONTRACT

Any contract resulting from a proposal submitted in response to this RFP will include terms and conditions stipulated by the Town, including, without limitation, additional Bidder representations and warranties, service level commitments, Bidder insurance requirements, non-exclusivity, and Town Indemnification. Any contract resulting from the award of this RFP must be approved and authorized by the Town of Monroe Town Council and executed by the First Selectman.

INDEPENDENT CONTRACTOR

It is expressly agreed and understood that Contractor will at all times act strictly and exclusively as an independent contractor and shall not be considered under the provisions of the contract or otherwise as having any employee status with the Town.

SUBCONTRACTOR

Subcontractors are not to be engaged without the prior written authorization from the Town.