



# TOWN OF PUTNAM

MUNICIPAL COMPLEX

TOWN HALL

200 SCHOOL STREET • PUTNAM, CT 06260

## Request for Proposals (RFP)

### POCD 2026

## CONSULTING SERVICES FOR PLAN OF CONSERVATION AND DEVELOPMENT

*Submissions shall be addressed to:*

Bruce Fitzback, LLS  
Land Use Director  
Town of Putnam  
200 School St.  
Putnam, CT 06260  
[Bruce.Fitzback@putnamct.us](mailto:Bruce.Fitzback@putnamct.us)

***Submission Deadline:  
August 1, 2024, 2:00 PM***

**Date:** June 24, 2024  
**To:** Prospective Respondents  
**Subject:** Request for Proposal (RFP) POCD 2026: Consulting Services for Plan of Conservation and Development

The Town of Putnam invites interested firms to submit a proposal based on the requirements of the RFP. The RFP can be found on the Town of Putnam website,

<https://www.putnamct.us/government/town-administrator/bidsrfps>

The information contained herein outlines the intent and scope of the project; and the guidelines governing the submission and evaluation of all proposals.

We ask that your proposal conforms to our format request as closely as possible. The Town may accept proposals that take exception to any requirement in the RFP. Any exception or alternative must be clearly delineated in a separate attachment to the proposal submitted. This letter, the RFP, and the proposal submitted by the successful Consultant will be made part of the resultant contract between the Town and the successful Consultant.

All proposals must be received in the Land Use Office by **2:00 P.M. Thursday, August 1, 2024**

One Original (clearly identified as such) plus a read only copy on a thumb drive shall be submitted to the attention of

**Land Use Department  
Town of Putnam  
Municipal Complex  
200 School St.  
Putnam, CT 06260**

The Package submitted containing proposals shall be sealed, bearing on the outside the firm's name and address and plainly marked "**RFP POCD 2026 CONSULTING SERVICES FOR PLAN OF CONSERVATION AND DEVELOPMENT**"

Questions about the Scope of Services, submission and other requirements may be directed to Bruce Fitzback, Land Use Director at [Bruce.Fitzback@putnamct.us](mailto:Bruce.Fitzback@putnamct.us) no later than 4:00 p.m., July 19, 2024. *Consultants are required to limit their contact with the Town regarding this RFP to the persons named herein.*

The Town of Putnam looks forward to receiving your response.



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**Town of Putnam**

**Request for Proposal  
RFP POCD 2026**

**Consulting services for Plan of Conservation and Development**

**1. INTENT**

The Town of Putnam is seeking proposals from qualified land use planning firms or teams to assist the Planning and Zoning Commission in the preparation of an update to the Town of Putnam's 2016 Plan of Conservation and Development (POCD) in accordance with Section 8-23 of the Connecticut General Statutes.

The Town seeks assistance in updating the Town of Putnam's 2016 Plan for Conservation and Development, including all requisite associated documents, presentations, plans, maps, and electronic files. Consultants/firms shall have extensive experience and knowledge in the fields of municipal planning and zoning including, but not limited to, land use, transportation, housing, infrastructure, basic human needs, economic, clean energy, and environmental stewardship and development trends.

In general, the updated Plan shall contain all statutory requirements and other items such as, but not limited to:

- Community survey with acceptable level of statistical accuracy.
- Population and demographics analysis and projections.
- Generalized future facility needs.
- Transportation systems including roads, sidewalks, multi-purpose trails and other public ways.
- Diversity of housing. Affordable housing goals.
- Protection and preservation of agriculture and open space.
- Low impact development strategies.
- Economic development goals.

- Build-out analysis.

The Town's 2016 POCD is available on the Town's website here:  
<https://www.putnamct.us/departments/planning-and-land-use>

The Town looks forward to a new 2026 POCD that is comprehensive, yet simple to understand and implement.

## **2. SUBMISSION AND DEADLINE**

- 2.1 All proposals must be received in the office of the Land Use Department by **2:00 P.M., August 1, 2024**. One original (clearly identified as such) plus a read only copy on a thumb drive shall be submitted to the attention of the Land Use Department at:

**Land Use Department  
Town of Putnam  
Municipal Complex  
200 School St.  
Putnam, CT 06260**

- 2.2 Package containing proposals must be sealed, bearing on the outside the Consultant's name and address and plainly marked "**RFP POCD 2026; Economic Development Consultant.**"
- 2.3 Questions about the Scope of Services may be directed to **Bruce Fitzback Land Use Director**, at [Bruce.Fitzback@putnamct.us](mailto:Bruce.Fitzback@putnamct.us). The deadline for questions regarding this Request for Proposals is 4:00 p.m. July 19, 2024. Written clarifications or amendments to this RFP will be issued by addenda, no later than 4:00 p.m., July 24, 2024. Only information issued by formal written addenda will be binding. Addenda will be posted solely on the Town's website.
- 2.4 Consultants are required to limit their contact with the Town regarding this RFP to the persons named herein.
- 2.5 The Town may entertain the submission of proposals from a team of consultants. The submission of any such proposal shall clearly spell out roles and responsibilities between the parties and identify the lead Consultant with whom the Town will contract and who will coordinate the activities of any sub-consultants.
- 2.6 The Town may accept proposals which take exception to any requirements in this RFP, or which offer any alternative to a requirement herein. Any exception or alternative must be clearly delineated and cannot materially affect the substance of this RFP.

## **3. SPECIAL INSTRUCTIONS**

- 3.1 Consultants responding to this Request for Proposals are hereby notified that all proposals submitted, and information contained therein and attached thereto will not become public information until the Town has awarded a contract to the successful

respondent.

- 3.2 Consultants responding to this Request for Proposals must have sufficient staff and expertise to complete the required services. The Consultant must agree that all personnel assigned to this project are qualified for this type of work.

#### **4. BACKGROUND INFORMATION**

- 4.1 Putnam was incorporated in 1855 by combining several villages and residential enclaves associated with textile manufacturing mills and three railroad companies. The area became the transportation center of the northeast, boasting several grand hotels. Putnam has changed over the last century – it is no longer the type of bustling mill town that transformed rural New England into the nation's industrial leader. Despite economic hardship, the Town has displayed remarkable resiliency, mainly due to a combination of factors that perhaps are not individually significant but collectively sustaining. The Town offers a stable, affordable residential base and an abundance of natural beauty and rural character. With a vibrant Downtown of restaurants and cultural locations, a near-capacity industrial park, Day Kimball Hospital, a Superior Courthouse, and a critical mass of big box retail, Putnam is playing an increasing role as the region's institutional, governmental and employment center. Access, now provided by I-395, is a primary reason.
- 4.2 The selected consultant will provide the Town with professional services to realize the activities outlined in the Plan of Conservation and Development. The consultant will be responsible for coordinating work with all sub-contractors.

#### **5. SCOPE OF SERVICES**

The Plan of Conservation and Development adopted in 2016 contains many policies and goals that remain important to the community today. While the 2016 plan will serve as a starting point or reference for this update, this new plan will share the needs, vision, and sentiment of today and into the future.

While existing plans provide context and guidance, the Town seeks a new approach for the plan's process, organization, and format. The completed plan should be innovative and accessible. The planning process should be inclusive. This plan should be accessible to decision makers and the public and be easily accessed and useful. Special attention should be paid to the plan's visual and graphic appeal. The plan must conform to Connecticut statutory requirements but should also address the issues identified in section 1.

The Consultant should be prepared to engage with all Boards and Commissions, community groups, staff, residents, and businesses. Public engagement for this process should be fully inclusive to determine community needs and values, producing a guiding vision and themes for the plan. A variety of formats, which may include the Town website, social media, video, participatory workshops, and charrettes should be utilized. Facilitation participation by underrepresented populations should receive focus.

The following is a generalized outline of areas expected to be covered in the plan the consultants are anticipated to play a role in undertaking. There isn't a proposed or expected methodology for treating these items. Your proposal should relate your approach to them and how the plan might be structured.

#### 5.1 Data Collection

- A. Source Data Collection
  - Town Planning and Zoning Commission
  - Municipal Government (boards, commissions, staff)
  - General Government (Mayor and Board of Selectmen)
  - Other Agencies/Sources
- B. Public Input
  - Information, Opinion and Data Collection from the General Public
  - Statistically Valid Survey

#### 5.2 Review and Development of Community Profile

- A. Analysis of Data (characteristics, trends, and projections)
  - Population
  - Economic Development and Employment
  - Housing
  - Land Use
  - Environment
  - Transportation
  - Community Services
  - Education, College & Career Readiness, Lifelong Learning
  - Parks and Recreation
  - Open Space and Agriculture
  - Water and Sewage Services, Solid Waste
  - Public Safety
  - Infrastructure
- B. Graphics
  - Maps, plans, charts, tables documenting findings

#### 5.3 Goals and Objectives

- A. General
  - Values, Vision, and Action Plan Summary – What do the people of Putnam value most? How can we sustainably honor these values?
  - Land Use
    - Land Use
    - Demand/Supply of Various Categories
  - Economic Development

- Housing
- Transportation
- Community Services
- Schools
- Parks and Recreation
- Open Space and Agriculture
- Infrastructure

B. Areas of Special Study and Concern

- Existing /Future Town-Owned Open Space Management Plan
- Strategies for the gateway area along School St
- Strategies for the Providence St
- Strategies for the St. Mary's School Area
- Housing Strategy and the Affordable Housing 5 year plan
- Evaluation of Existing Zoning Districts

5.4 Implementing the Plan

Make specific, actionable recommendations and strategies to accomplish goals and objectives. Include short term, small projects and long term, larger efforts. Who are the implementers and who are their partners?

5.5 Public Presentation

5.6 Plan Adjustment Based Upon Comments

5.7 Formal Adoption of Plan

5.8 Delivery of Work Products

5.9 Publication of Plan

It is anticipated that the community planning effort will be an inclusive participatory process that leads to consensus among the citizens of the Town relative to a ten-year term. It will offer a vision of the community well into the future and a plan of action and implementation. The Putnam Town Planning and Zoning Commission and staff will work closely with the chosen firm to identify the scope of the update from input at initial public meetings. The consultant shall act as facilitator to the Plan at all workshops, public engagements, meetings, and hearings.

Additionally, the consultant shall work closely with Town staff in the preparation of all notices, transmittals, submissions, and other related requirements as mandated by statute.

**6. DATE AVAILABLE**

The Town of Putnam Land Use staff as well as the Economic and Community Development Department staff will be available to support this project. Zoning, land use, wetlands, storm drainage and many other mapping layers are available for inclusion in this project. Other data reasonably required by the proposer(s) will be made available.

**7. TIMEFRAMES**

7.1 The anticipated RFP schedule is as follows:

7.1a	RFP Issued	June 28, 2024
7.1b	Proposals due	August 1, 2024
7.1c	Proposal Review Completed *	August 15, 2024
7.1d	Select Respondent	August 23, 2024

*\*The Town reserves the right to make a selection on the basis of the proposal alone; however, it may invite selected respondents for interview at its discretion.*

7.2 The successful Consultant will be expected to commence services upon contract execution.

**8. CONTRACT MANAGEMENT**

8.1 The Consultant will work under the direction of the Land Use staff.

8.2 The selected Consultant will assign one qualified individual, who will be the firm's day-to-day contact person, who will be responsible for directing and coordinating the activities of the firm's personnel in all aspects of the project.

**9. EVALUATION AND AWARD**

9.1 **Selection Criteria**

The following criteria will be used, without limitation, in evaluating proposals and determining the most responsive Consultant:

9.1A Ability to approach the development of the Plan and facilitation of public engagement in an innovative, exciting, equitable, inclusive, and productive manner.

9.1b Reputation, professional qualifications and diverse backgrounds and perspectives of the team of individuals assigned to complete the project.

9.1c Experience with Connecticut governmental entities in the completion of similar programs including the relevant experience of key personnel to be assigned to the project.

9.1d Presentation, quality, and readability of previously prepared town plans.

9.1e Ability to perform the work in a timely manner.

9.1f Proposed fees and costs, although the Town is not bound to select the



Consultant who proposes the lowest fees. The Town reserves the right to negotiate fees with the selected Consultant.

Proposals in response to this RFP will be reviewed against the criteria listed above, and recommendations for the award will be made in accordance with Town purchasing procedures.

## 9.2 **Selection Procedures**

The Town intends to enter into a contract with the most responsible Consulting Firm whose proposal is determined to be in the best interest of the Town.

- 9.2a The Town reserves the right to reject any or all proposals or parts thereof for any reason, to negotiate changes to proposal terms, to waive minor inconsistencies with the RFP, and to negotiate a contract with the successful Consultant.
- 9.2b It is anticipated that several of the Consultants whom the Town determines to have submitted the most responsive proposals may be invited to interview and make a presentation to Town staff.
- 9.2c The Town, after a thorough review of the proposals received, and after conclusion of the interview process, if needed, will award the contract to the Consultant whom the Town deems best qualified to perform the services required under this contract.

## 10. **PROPOSALS**

The Town will not be liable for costs incurred in the preparation of the response to this RFP or in connection with any presentation before the Town. Proposals submitted must be bound, paginated, indexed, and numbered consecutively. The original proposal must be clearly marked as such. Consultants shall submit as their proposal the following:

**10.1 Letter of Transmittal:** A letter of transmittal addressed to **Land Use Department**, which includes a statement by the respondent accepting all terms and conditions and requirements contained in this RFP. The letter should also include a brief discussion of the Consultant's background, experience, and ability to perform this contract in accordance with the Scope of Services. Also to be included, is a listing of clients for whom similar services were performed.

### **10.2 Detailed Proposal, which includes the following sections:**

10.2a Ability to perform. Provide examples of previous work on similar projects to demonstrate the consultant's understanding and familiarity with projects of this type. Firms shall list all plans of conservation and development projects of comparable type which have been completed in the last five years. Information regarding the team of professionals to be assigned to this project, including information regarding the qualifications of any proposed subcontractors.

- 10.2b Experience: Provide information concerning the background, experience, and reputation of the consultant.
- 10.2c Staff Plan: Identify key personnel whom the firm will assign to perform services under this contract. Indicate their background, experience and areas and levels of responsibility. Provide the resumes of all key personnel.
- 10.2d Project Approach. Outline a proposed approach to the project, including information on community outreach, consensus building and innovative approaches to municipal planning. Provide information on the consultant's planning philosophy and proposed approach to the development of Putnam's 2026 Plan of Conservation and Development.
- 10.2e Services Expected of the Town: Define the nature and scope of all services to be provided by the Town.
- 10.2f References: Provide a list of previous and current contracts which are similar to the Town's scope of services. The list shall include the following:
- Dates of contract duration;
  - Services performed and fees for services;
  - Name, address, telephone numbers of clients which may be contacted for verification of data submitted;
  - Statement as to whether the project was completed on time and within budget.
- 10.2f Familiarity with Putnam. Extent of local knowledge of Putnam and/or communities experiencing similar characteristics, development patterns and issues. Demonstrate a working knowledge of issues typically facing a community like Putnam and its potential in the future.

**10.3 Fee Proposal:** Consultants are required to submit a fee proposal which includes the following:

- 10.3a A breakdown of tasks and associated fees, including personnel costs and direct costs.
- 10.3b The Town reserves the right to negotiate the fees or rates and payment schedules with the successful Consultant.

All Proposals must be signed by the firm's authorized official. The proposal must also provide name, title, address, and telephone numbers for 1) the individual with authority to negotiate and contractually bind the firm, and 2) those who may be contacted for the purpose of clarifying any information provided therein.

**11. GENERAL REQUIREMENTS**

**11.1 Insurance:**

Consultant shall agree to maintain in force at all times during the contract the following minimum insurance types and coverages and shall name the Town of Putnam as an Additional Insured on a primary and non-contributory basis per contract to all policies, except Workers Compensation and Professional Liability. All policies should also include a Waiver of Subrogation in favor of the Town except Professional Liability. A certificate of insurance is required and Consultant shall defend, indemnify and hold Town harmless from and against any claims that arise from the ‘Project’ to the fullest extent permitted by law.

Insurance shall be written with Carriers approved in the State of Connecticut and with a minimum AM Best’s Rating of “A-“ VIII. In addition, all Carriers are subject to approval by the Town of Putnam.

		(Minimum Limits)
General Liability	Each Occurrence	\$1,000,000
	General Aggregate	\$2,000,000
	Products/Completed Operations	\$2,000,000
	Aggregate	
Auto Liability	Combined Single Limit including owned, hired and non-owned	\$1,000,000
Umbrella/Excess Liability	Each Occurrence	\$5,000,000
	Aggregate	\$5,000,000
Professional Liability	Each Claim	\$2,000,000
	Aggregate	\$2,000,000

If any policy is written on a “Claims Made” basis, the policy must be continually renewed for a minimum of two (2) years from the completion date of this contract. If the policy is replaced and/or the retroactive date is changed, then the expiring policy must be endorsed to extend the reporting period for claims for the policy in effect during the contract for two (2) years from the completion date.

Workers’ Compensation and Employers’ Liability	WC Statutory Limits	
	EL Each Accident	\$1,000,000
	EL Disease Each Employee	\$1,000,000
	EL Disease Policy Limit	\$1,000,000

Original, completed Certificates of Insurance must be presented to the Town of Putnam prior to contract issuance. Consultant agrees to provide replacement/renewal certificates at least 60 days prior to the expiration date of the policies. Should any of the above-described policies be cancelled, limits reduced, or coverage altered, 60 days written notice must be given to the Town of Putnam.

## 11.2 Conditions

Consultants responding to this RFP will be expected to adhere to the following conditions in an agreement with the Town and must make a positive statement to that effect in its proposal submitted:

- 11.3a The Consultant has personnel sufficient to assure service continuity and project completion and agrees to maintain adequate qualified personnel for the full duration of the contract.
- 11.3b Agree that all work produced under this agreement will become property of the Town of Putnam.
- 11.3c Agree to provide the insurance coverage herein specified for the full duration of the contract's term, including any and all extensions.
- 11.3d Agree to accept and follow management direction from the Town and specifically, the individuals named herein or their duly authorized designee(s).
- 11.3e Agree to conform to all applicable laws and ordinances and policies of the Federal Government, State of Connecticut and Town of Putnam.
- 11.3f Agree that if the Town cannot in good faith negotiate a written contract within a reasonable time with the selected Consultant, the Town may unilaterally cancel its selection of that Consultant.
- 11.3g Agree that periodic payments to the Consultant will be made as agreed upon in the signed contract.
- 11.3h Agree that if services are not performed in a timely manner so as to meet the Town's stated time frame, the Town may withhold payment, or portions of payment.
- 11.3i Agree that the Town reserves the right to terminate the contract at any time. In the event of contract termination, the Consultant shall be entitled to payment for approved services rendered after the execution of the contract and prior to receipt of notice of termination.
- 11.3j Agree that the contract between the Town and the Consultant shall be governed by and construed in accordance with the laws of the State of Connecticut and the ordinances of the Town of Putnam.
- 11.3k Agree that no conflict of interest exists. Identify the nature of any potential conflict of interest your firm might have in providing services to the Town under this RFP. Discuss fully any conflicts of interest, actual or perceived, which might arise in

connection with your firm's performance of the proposed agreement. If conflicts do or might exist, describe how your firm would resolve them.

**12. ANTI COLLUSION STATEMENT**

Proposers and their employees, officers, advisers, agents or sub-contractors must not engage in any collusive bidding or other anti-competitive conduct, or any other similar conduct, in relation to:

- the preparation or submission of Proposals;
- the clarification of Proposals; and
- the conduct and content of negotiations, including final contract negotiations, in respect of this RFP or procurement process, or any other procurement process being conducted by the Town in respect of any of its requirements.

**14. ADDITIONAL INFORMATION AND REVISIONS TO PROPOSALS**

Information may be provided to potential respondents for the purpose of clarification to assure full understanding of, and responsiveness to the Request for Proposals requirements. Prospective respondents shall be afforded fair and equal treatment with respect to access to additional information and revision of proposals.