

## Scope of Services

### I. Project Overview

#### A. Summary

The City of Stamford Land Use Bureau (LUB) is soliciting proposals for a 10-year Comprehensive Plan in line with State of Connecticut Public Act No. 15-95. The Comprehensive Plan 2025-2035 (the “Comprehensive Plan” or the “2035 Plan”) will include an update to the Stamford Affordable Housing Plan (or “Housing Plan”, as required by the State of Connecticut and City of Stamford Ordinance). The Comprehensive Plan and Housing Plan will be developed by the chosen consultant in partnership with the LUB and will include significant community engagement and clear design. The City is also looking for the proposal to address data collection needs of the City’s Community Development Department to update the Consolidated Plan and create the Equity Action Plan as required by the United States Department of Housing and Urban Development.

#### B. Goal

To create a framework for achieving the goals and aspirations for the next ten years as set by its residents and government.

#### C. Required Scope of Work

##### 1. Phase 1 – Data Collection

The four plans – Comprehensive Plan, Housing Plan, Consolidated Plan, and Equity Action Plan - use similar data. Instead of separate efforts to gather and analyze data, the City would like to join efforts and gather overlapping data in one fell swoop. Examples of overlapping data include demographics and socioeconomic conditions. As a starting point for data collection, all data included in the Housing Affordability Plan of 2022 and Consolidated Plan of 2020 shall be updated. There may be additional data needs for the Equity Action Plan as defined by the Community Development Department. There may be additional data needs for the Comprehensive Plan as defined by the Consultant and the City. Data will be shared with Community Development Department to update the Consolidated Plan and create the Equity Action Plan. The chosen consultant will use the data to update the Housing Plan and create a new Comprehensive Plan.

The data collection phase of the overall project could become large and burdensome. A successful Phase I would take 1-2 months to complete, will be well-organized and data will be transferred to the City in a usable format. For the Comprehensive Plan, several pages highlighting major trends will be important for the body of the document, but data and analysis will be provided in an appendix (see Appendix B for a potential 2035 Plan outline). Consultants should also review local and regional plans during this phase (see Appendix A) so the updated Comprehensive Plan can support, not contradict, local and regional planning initiatives.

##### 2. Phase 2 – Comprehensive Plan and Housing Plan Update

Comprehensive Plan. A Comprehensive Plan presents a Vision for the future and recommendations on how to achieve the Vision. If you have been to recent public hearings in Stamford, it is apparent that residents are divided on the City's growth. The LUB has identified six often interrelated topics that can characterize land use conversations in Stamford since the 2015 Master Plan that should be addressed in the 2035 Plan:

1. Sustainability and resiliency;
2. Diversity, equity and inclusion;
3. Mobility;
4. Housing affordability;
5. Economic development;
6. Infrastructure.

These six topics could form the basic structure of the 2035 Comprehensive Plan. However, the housing component should be able to be used as a standalone report to meet the State's reporting requirement. The 2035 Plan is an opportunity to ask targeted questions about these topics and the City's future land use, receive Citywide input, and prepare a Vision of the future that reflects the pulse of Stamford at this point in time.

The Comprehensive Plan should be concise, actionable, and created based on ideas from a diverse base of Stamford residents. In terms of the first two characteristics, being concise and actionable, reviews of existing conditions and summaries of engagement should be saved for appendices while significant trends and patterns should be presented in the body of the Comprehensive Plan (see Appendix B for a potential 2035 Plan outline). Recommendations should be specific rather than vague and general.

To make the Comprehensive Plan actionable, the chosen consultant should identify sites or areas and recommend a package of actions that reflect the 2035 Plan's recommendations on how to implement the Comprehensive Plan Vision. In Appendix B, these are referred to as "Keystone Projects," but the terminology is not fixed. For example, perhaps there is a vacant site. What programming, if any, should go on the site that is aligned with the Vision and would best serve the City? Are there any grants that could help finance redevelopment? Would there be a re-zoning or Comprehensive Plan amendment to facilitate redevelopment? How would the project contribute to the City's sustainability or housing stock? Is the project inclusive? Can existing infrastructure support the proposed project? How could the proposed project impact the City's economy? Essentially, these Keystone Projects would reflect the Vision and show how it could be implemented.

Finally, all residents of Stamford should be thoroughly engaged in their neighborhoods, using multiple formats of meetings and additional methods to gather people's thoughts and ideas. Engagement of residents should occur throughout the lifecycle of the project to provide for continuity and feedback loops. Recommendations or Keystone Projects should directly reference public commentary

when available. Special attention should be given to hard-to-reach populations. Strive for representation. Consider the digital divide and what that means for engaging Stamford residents. Resources required to engaged hard-to-reach populations should be budgeted for and could include, but not be limited to translation and interpretation services, meeting people where they are, holding meetings at various times to ensure people who work can attend. LUB Staff will help supplement consultant staff at engagement meetings. The Consultant should be prepared to provide the Planning Board and the appropriate Committees of the Board of Representatives with project updates at key milestones in the process. Five key milestones include: after project kickoff to introduce the Consultant Team to each Board/Committee, at the completion of Data Collection and Analysis to report on takeaways, midway through the project for an update on engagement outcomes and defining the vision, when draft recommendations/keystone projects are ready but not set in stone, and prior to public hearing and adoption by the Planning Board for a final presentation.

Housing Plan. The State requires municipalities to prepare or amend and adopt a Housing Plan at least once every five (5) years. Stamford’s first Housing Plan was completed in May 2022 and covers 2022 through 2027. The City would like to align all land use plans to similar timelines. As such, a Housing Plan for 2025-2030 shall be prepared. As noted in Section I(A), Summary, the Housing Plan will be a subsection of the Comprehensive Plan but should also be able to stand on its own.

The Housing Plan of 2025-2030 should not reinvent the wheel. Data from the 2022-2027 Plan should be updated to reflect today’s population and market. An analysis of 2022-2027 Housing Plan recommendations that have worked and have not worked should be prepared. Common misconceptions about fee-in-lieu funding should be dispelled. The new 2035 Plan should also consider the best practices in the Regional Plan Association’s guidebook, “Planning for Affordability in Connecticut.”

### 3. Phase 3 – Designing the Comprehensive Plan

The design of the Comprehensive Plan is critical because good design can positively impact readability, enjoyment, comprehension, and implementation.

The City’s Master Plan 2002-2012 (the “2002 Plan”) is an example of good plan design and formatting. Here are several examples from the 2002 Plan that make it successful and could be replicated in the 2035 Plan. There are 2 main sections of the 2002 Plan (Citywide Policies and Neighborhood-Specific Plans) that are supported by subject-specific reports (Economic Development, Urban Design, Traffic and Transit, Affordable Housing, and Community Input). There is also a summary pamphlet. Having 1-2 main sections creates the need for concise language and helps readability because it is focused on action items. Having standalone supporting reports allows people to deep dive into a topic of their choosing. The 2002 Plan includes many photos of people and

places to help the reader visualize the text and how it applies to Stamford and its neighborhoods. Maps identify intersections and include drawings to improve the intersections. The variety of well-designed graphics helps balance the amount of text with visuals and white space. Other successful elements include callouts and a distinct color palette. Even on pages that are text-heavy, large margins are used to help the reader focus and absorb the text that is on the page. See Appendix B for a potential outline for the Comprehensive Plan based on the 2002 Master Plan. Of note, detailed summaries of data collection and engagement would be saved for an appendix while the body of the 2035 Plan would be concise by focusing on data trends and themes of public commentary.

Text heavy pages should be avoided. Adobe or another graphic design tool is preferred to produce this report over Microsoft Word. Quality graphics enhance the perceived quality of the report.

#### D. Timeframe

State of Connecticut Public Act No. 15-95 requires a municipality to update their Plan every 10 years. In Stamford's case, December 16, 2024 is the deadline for the decennial update. The City, however, understands this is a tight turnaround for a large project requiring thorough community engagement and that there are mechanisms established by the Public Act to request a waiver of this requirement so long as the City is acting in good faith and is in the process of updating their Plan. As such, the City is open to considering a longer timeline for completion of the 2035 Plan, not to exceed 18 months.

#### E. Deliverables

The successful proposer shall provide the following deliverables to the City of Stamford Land Use Bureau for their exclusive use:

1. Quarterly for the duration of the project: written reports about the status of the project, and progress made, including public engagement.
2. The project website should be up and running no later than 3 months after the start date of the project.

At the end of the project: A detailed Comprehensive Plan and Housing Plan including maps, graphics, illustrations, tables and other supporting material shall be provided in electronic format, as well as 30 hardcopies. All raw data collected as part of this project, be it in tabular or other form (e.g., shapefiles, field notes) shall be provided. Metrics on community engagement shall be included such as number of meetings, number of residents engaged, etc. A summary pamphlet in electronic format, as well as 15 hardcopies. An editable template for an Annual Comprehensive Plan Progress Report.

## II. Required Elements in Response to this RFP

To be considered an eligible proposer, the consultant (or team) must submit to the City of Stamford a proposal with the following materials

#### A. Approach to Data Collection

Provide a summary of your team's approach to gathering, analyzing, and presenting data.

#### B. Engagement Strategy

The Comprehensive Plan must be based on thorough community engagement. Provide a summary of your team's approach to community and stakeholder engagement. Types of engagement shall include but not be limited to in-person public meetings, virtual public meetings, large group meetings, small group meetings, website, social media (Instagram, Facebook), fliers, print and online advertisements, email blasts, public schools, attendance at or participation in community events. Estimate the number of events, frequency and duration that will be employed for the Comprehensive Plan. Describe how engagement can be evaluated for effectiveness and metrics that can be used to do so. Discuss how you plan to reach hard-to-reach populations. Partnerships with local non-profits such as New Neighborhoods and Building One Community can be great resources for reaching hard-to-reach populations. Touch upon how LUB Staff could be useful in supplementing the consultant staff at engagement meetings.

The engagement strategy should also cover the creation and management of the Steering Committee and Technical Advisory Committee, and updates to the Planning Board and appropriate Board of Representatives Committees. The Steering Committee is expected to be made up of the Planning Board Chair, Zoning Board Chair, a member of the Board of Representatives, a member of the Board of Finance, a representative of the Mayor's office and the Diversity Equity and Inclusion Officer. The Technical Advisory Committee is expected to include representatives from the Land Use Bureau, Community Development Department, Economic Development Department, Parks Department, Sustainability and Health Department. The committees shall meet regularly, perhaps quarterly, to review deliverables and provide input and expertise to the City staff and consultants in the development of this plan. Progress updates to the Planning Board and appropriate Board of Representatives Committees made at several key milestones throughout the process.

#### C. Recommendations and Implementation Strategy

Provide an explanation of your team's approach to developing a comprehensive plan. Explain and provide examples of how your team has successfully made plans actionable in the past.

#### D. Schedule

Provide a detailed schedule on how the scope of work will be accomplished. The detailed schedule shall depict when deliverables will be completed within the allotted timeframe and a tentative schedule of meetings. The City is looking to partner with the chosen consultant to complete this plan and expects check-in meetings between the consultant and LUB main point of contact at least monthly.

#### E. Budget

Provide a detailed budget showing how the scope of work will be accomplished within the allotted budget. The budget should be broken into three (3) parts: professional services, direct expenses, and other (requires explanation).

#### F. References and Resumes

Provide a list of personnel that will be assigned to work on the various elements of the project. The people listed in this material must be available and be the people who will do the work. This is especially important for the senior-level professional planners. Resumes shall be provided.

Provide evidence of timely and successful performance in similar projects, including three (3) references from employers of similar projects within the past five (5) years. References should be for projects completed by personnel assigned to work on the various elements of this project. Personnel should be noted next to each reference. Phone numbers and/or email addresses should be provided for references.

### III. Experience and Qualifications of the Consultant

#### A. Community Engagement.

This element includes experience in: (1) identification of stakeholders; (2) developing appropriate methods to obtain stakeholder participation throughout the planning process; (3) reaching hard-to-reach populations that are linguistically, economically or otherwise isolated; (4) serving as a neutral facilitator and team builder; (5) working with the public to articulate community goals and Vision for the future; (6) assisting with media relations and public awareness; and (7) effective use of internet and social media to enhance public participation and engagement of the public.

#### B. Graphics.

This element includes experience in using GIS, Adobe and other appropriate computer assisted techniques to meet the following objectives: (1) expressing complex ideas in visual form for use in presentations and reports; (2) developing a framework for the POCD that is easy to read and digest, presenting information in concise language; (3) creating a branding for Comprehensive Plan that is easily recognizable on outreach materials, City websites, and the actual Comprehensive Plan deliverable.

#### C. Technical Planning Assistance.

This element includes experience in (1) producing a Vision-oriented Comprehensive Plan while working as a team with City staff; (2) utilizing the latest modeling techniques to develop a technically sound land use and policy recommendations; (3) developing workable solutions to environmental issues; (4) developing acceptable capital improvement and other implementation tools that will guide the City in its short- and long-term decision process.

#### D. Contract management.

A key skill the City seeks in selecting consultant assistance is that the team has a track record of successfully managing to completion large-scale projects on time and on budget. The City is not looking for the Comprehensive Plan update to extend beyond twelve (12) months nor is the City looking for “add-ons” to be provided that are above the \$250,000 budget. The City is looking for a consultant team that is energized for an intense twelve (12) months deep diving into the City’s challenges, assets, and achieving the Vision of the future.

E. Flexibility.

Within a collaborative process there are many times when consultant assistance is vital to the success of the whole project and it is not possible to plan for these situations at the time of negotiating the Scope of Work. Therefore, the successful consultant (team) will demonstrate they are willing and able to adapt (within reason) to potential changes that may occur.

IV. Criteria for Consultant Selection

Qualifications will be reviewed using the following criteria. The consultants (or team) must demonstrate:

- A. A clear understanding of this project’s scope, goals and process, as well as a creative approach to elements of the RFP.
- B. Familiarity and experience with major land use, zoning, and transportation projects, as well as collaborative decision-making among stakeholder groups.
- C. A demonstrated ability to do a wide range of tasks, including zoning, land use and transportation planning, community outreach, graphic design, economic development, and other tasks identified within the RFP.
- D. The successful consultant (team) must be available for both regular daytime meetings and evening meetings, with evidence of flexibility to meet the needs of the RFP that may change once the City’s needs are better identified. It is impossible for the City to plan for every possible situation; therefore, the consultant team must be flexible enough to deal with situations as they occur.
- E. Evidence of capacity to do the work within the RFP while maintaining a quality process and product.
- F. Evidence that qualified personnel will be assigned to work on the various elements of the project. The people listed in this material must be available and be the people who will do the work. This is especially important for the senior-level professional planners.
- G. Evidence of timely and successful performance in similar projects, including three (3) references from employers of similar projects within the past five (5) years. References should be for projects completed by personnel assigned to work on the various elements of the project. Personnel should be noted next to each reference. Phone numbers and/or email addresses should be provided for references.
- H. Completion of all proposal requirements as stated above.
- I. Competitiveness of proposal fees in comparison to other proposals for this 2035 Plan.

## V. Consultant Selection Process

The City of Stamford will host a mandatory pre-proposal meeting.

Consultants will have four weeks from advertisement to prepare and submit proposal materials to the City of Stamford.

Vendors may be asked to present their proposals to a selection committee and/or to respond to questions. Based on the information provided in the proposal and any additional information presented, a final selection will be made.

The City of Stamford reserves the right to reject any and/or all proposals submitted, to request information from any vendor and to negotiate with any of the vendors regarding the terms of the engagement. The City of Stamford intends to select the vendor that, in its opinion, best meets the City's needs, not necessarily the vendor that proposes the lowest fees.