COMPREHENSIVE PLAN / DOWNTOWN MASTER PLAN REQUEST FOR PROPOSALS



Date Issued: September 19, 2022

Due Date: October 21, 2022



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1.0 PROJECT SUMMARY

1.1 BACKGROUND

The Town of Weddington, North Carolina (Town) is seeking responses from qualified planning professionals whether that be individual firms or teams of consultants (Consultant) to provide community planning services to support the development of a new Comprehensive Plan (Plan). The Plan will serve as a reference guide for Town staff, officials, and partner organizations as they regularly make decisions for the future of the community.

The Town is interested in firms or teams of consultants that are capable of providing professional services including: research and analysis of historic, present, and future land use patterns; limited market analysis; mapping; creative and diverse methods of public engagement and community visioning; development of recommendations for successful plan implementation; and document preparation.

In conjunction with the comprehensive planning process, the Town would also like to develop a new Downtown Master Plan. The Town established a Downtown Overlay District in 2015 and adopted a few associated Land Use Plan policies. Since that time, minimal development has occurred within the Downtown Overlay District; however, there has been public discussion regarding the clarification of the location of the "Town Center" as well as possible expansion of the Downtown Overlay District. The new Downtown Master Plan

should address these issues, develop design guidelines, and recommend specific implementation strategies.

1.2 COMMUNITY INFORMATION

Located in northwest Union County, approximately 15 miles southeast of uptown Charlotte and 10 miles northwest of Monroe, the Town of Weddington is a thriving community of more than 13,000 residents. With its small downtown and access to big-city amenities, Weddington is one of the most highly desired locations in the Charlotte Metropolitan Statistical Area. As the popularity of Weddington has continued to grow, the Town has faced unprecedented development pressure. With municipal limits of approximately 17 square miles and greenfield rapidly dwindling, the Town is looking for strategies to manage growth, redevelop where appropriate, and keep the small-town rural charm that draws people to the community.

1.3 RELATED PLANNING EFFORTS

The Town's current Land Use Plan was most recently updated in 2019. While the revisions to the Land Use Plan addressed various issues, and relatively little time has passed, there have been dramatic changes in the world since that time, and the needs of the Town and its citizens continue to evolve.

The Land Use Plan has been revised numerous times with revisions being adopted four times between 2012 and 2019. The 2012 Land Use Plan served as a replacement to the 2002 Land Use Plan which was prepared by the Centralina Council of Governments, and which itself served as the replacement to the 1996 Land Use Plan written by the UNC Charlotte Urban Institute. Elements of these original plans may still be found in the Plan today.

It should be noted that the Urban Land Institute (ULI) prepared a Technical Assistance Program Report for the Town in July 2005. It is unclear as to how much, if any, of the recommendations of this report were ever incorporated into the Land Use Plan.

2.0 KEY TOPIC AREAS

2.1 COMPREHENSIVE PLAN

A successful Comprehensive Plan will remedy (or improve or resolve) the following:

- As part of the existing conditions report the Consultant shall conduct a limited market study. The market study should be used to link land use and development recommendations to existing and future market conditions. What are the best opportunities for Weddington?
- The Town desires a better sense of where its revenue might be derived, both now and in the future based on alternative land use plans. Accordingly, the Town is seeking the preparation of a Fiscal Impact Analysis summarizing the impacts of future residential growth vs. non-residential growth (commercial and tax-exempt) along the NC-16 and NC-84 corridors and extensions.

- There are several future transportation improvements planned in the Weddington area. The Consultant should examine these improvements, the extent of the potential impacts on the Town, and how the Town may best position itself to take advantage of these improvements, or what the Town should do to avoid unwanted development stemming from these improvements.
- The Town desires to be proactive in considering the future of potential development sites along the NC-16 and NC-84 corridors. What type of development is likely in the coming years? How can the Town best prepare for this development to ensure it receives the type of development desired?
- The Town has concerns over maintaining its rural nature within the ever-growing expanse of the greater Charlotte region. How can the Town maintain its agricultural, historical, and equestrian appearance along NC-16? How can this be incentivized, or how may the Town successfully disincentivize development in areas that it desires to remain rural?
- As the Comprehensive Plan will serve as a reference guide for Town staff, officials, and partner organizations, it should include an implementation plan. Plan recommendations should identify short-term actions, long-term policy decisions, potential sources of funding, implementation mechanisms, and implementation partnership opportunities, where possible.

2.2 DOWNTOWN MASTER PLAN

In conjunction with the comprehensive planning process, the Town would like to develop a Downtown Master Plan. In 2015 the Town created a Downtown Overlay District (District) and associated Land Use Plan policies. While no development has occurred within the District since its creation, projects have been proposed, but have either been withdrawn or denied.

Additionally, there has been much public discussion regarding an apparent inconsistency between the location of the "Town Center" and that of the District, as well as the possible expansion of the District. The new Downtown Master Plan should provide much needed clarification of this issue, as well as develop design guidelines, and recommend specific implementation strategies.

Key Topic Areas for the Downtown Plan:

- While the Town has very limited land area zoned for commercial development, there exists extensive commercial development in adjacent jurisdictions (i.e., Blakeney, Rea Village, Stonecrest, Village Commons, Waverly) which are utilized by Town residents. Is the expansion of the District necessary? If so, then where should this occur, and how much is viable as neighborhood scale businesses serving the needs of residents?
- As previously noted, the Town has very limited commercial development and what the Town does have has been in its current state since it was developed between 1994 and 2003. How can these existing commercial sites be reinvented? What form should that redevelopment take?
- Clearly establish both what is and what is not acceptable as commercial development.



3.0 SCOPE OF SERVICES

It is the expectation of the Town that the selected Consultant will fully lead the process to develop a Comprehensive Plan and Downtown Master Plan to address the key topic areas discussed in Sections 2.1, Comprehensive Plan, and 2.2, Downtown Master Plan, above, as well as the services described within this Scope of Services section. To achieve this goal, all expectations below must be identified within the Consultant's response. The performance of the Scope of Services will be considered and referred to as the Project. It is anticipated that the Project duration will be approximately 18 months from the time a contract is awarded to the presentation of a draft Plan for adoption by the Town Council. Responses should include any recommended deviations from this approximate timeline.

3.1 PHASE 1

Organization and background research.

- Initial meeting with Town staff to review the project timeline, schedule meetings, and begin the process of data acquisition.
- Review all existing plans, maps, documents, data, and other materials relevant to the project.

- Conduct initial meetings with key elected and appointed officials, and steering committee.
- Present initial findings to Town staff and Town Council.

3.2 PHASE 2

Develop and implement an extensive and innovative community engagement program that will obtain input from community members of all ages and backgrounds. This should include a variety of workshops and participatory events of different types and sizes. Online community engagement software or other technological tools may also be used to provide a well-rounded community engagement program. At a minimum, the community engagement program shall address the following:

- Identification of stakeholder groups.
- Engagement strategies and activities geared to reaching all identified stakeholder groups. Some activities may occur outside of normal working hours.
- Timeline for community engagement activities.
- Communication methods for sharing information.
- Strategy for effective and consistent messaging across platforms and messengers.
- Meaningful involvement of lower-income and underrepresented populations.

3.3 PHASE 3

- Develop Plan goals, objectives, and implementation strategies based on technical data and public input.
- Draft materials for review and comment by Town staff.
- Analyze consistency of current Town ordinances and policies in relationship to the Plan goals and objectives.
- Prepare draft documents for public review and comment and present to the Planning Board and Town Council.
- Prepare final documents and present at all associated meetings for adoption of the Plan. This will include, at minimum, one Planning Board meeting, and one public hearing before Town Council requiring in-person attendance by the Consultant. The Plan should be presented in a format and language that is user-friendly and easily understood by the general public.

3.4 PROJECT MANAGEMENT

The Consultant will manage the Project and coordination of any subconsultants and all Project activities, including meetings with staff and stakeholder groups. The Consultant will identify an individual as the Project Manager from their team to act as the direct point of contact for Town staff.

Throughout the Project, the Consultant will be responsible for the following:

- Creation of maps necessary for the Project, including working maps and maps of
 potential and final preferred land use in ArcGIS format (existing Town data layers will
 be provided to the Consultant as needed).
- Providing electronic copies of all flyers, hand-outs, and other materials used to announce events and gather input from the community (in both pdf and native formats).
- Preparing materials and providing partial staffing needed for community engagement activities (Town staff will also be involved in engagement activities).
- Creation of, and content for, any on-line engagement tools used for the Project.
- Organizing and preparing a minimum of bi-weekly updates, primarily via e-mail or telephone/video and occasionally in-person, to update Town staff on Project status, discuss issues, and review drafts.
- Preparing and providing periodic written status reports, as well as limited status update presentations, as required, to the Planning Board and Town Council.

4.0 PROPOSED TIMELINE

The schedule, as listed below, is the Town's intended course of action for this project. The Town will follow the schedule to the extent possible; however, the Town reserves the right to change both the sequence and timing if deemed necessary.

Issue RFP: September 19, 2022

Deadline for Questions: October 14, 2022, no later than 4:00 pm EST Response Deadline: October 21, 2022, no later than 4:00 pm EST

Evaluation of Responses: October 24 – November 4, 2022

Interviews: November 8-18, 2022
Anticipated Award Date: December 12, 2022

Project Kick-Off: January 2023

5.0 RESPONSE

5.1 RESPONSE CONTENT

Responses must include the information listed below:

- Cover letter.
- Qualifications for Consultant: A description of the Consultant with emphasis on work related to Comprehensive Plans for towns of similar size. A list of recent projects (with hyperlinks to completed plans or other similar prior work product examples) on which the key project team members have worked along with a description of their responsibilities, including the following information:
 - o Professional background;

- o Experience on similar prior projects;
- o Years of experience; and
- o Primary office location.
- Qualifications for Project Manager: A description of the Project Manager with emphasis on work related to Comprehensive Plans for towns of similar size. A list of recent projects (with hyperlinks to completed plans or other similar prior work product examples) on which they have worked along with a description of their responsibilities, including the following information:
 - o Professional background;
 - o Experience on similar projects;
 - o Years of experience; and
 - o Primary office location.
- Statement of Project Approach, including the following information:
 - o Overall approach to the Project;
 - Consultant's general philosophy regarding the provision of the requested services;
 - Detailed and comprehensive description of how the Consultant intends to provide the services requested or a Statement of Project Approach;
 - Approaches, methods and assumptions that will be utilized to accomplish the Scope of Services;
 - How and when data will be delivered to the Town, communication and coordination;
 - O Description of the working relationship between the Consultant and Town staff;
 - o How the Project will be managed and scheduled;
 - o Proposed work plan with schedule based on months of project divided into phases identifying key tasks, milestones, approximate dates and deliverables; and
 - O Innovative approaches to community engagement plans providing effective stakeholder engagement and public participation with examples of how input would be captured that is representative of all the Town's residents.
- Detailed outline of Consultant's management plan, including proposed staff, their availability, and their roles/responsibilities.
- If the team includes subconsultants, then provide a detailed explanation of the responsibilities of each subconsultant.
- A minimum of three (3) client references for both the Consultant and Project's Manager, for similar projects having recently been completed. These shall include the firm/agency name, address, email, telephone number, project title and information, and contact person. The Town reserves the right to contact each point of contact.
- Provide Consultant's Cost Proposal detailing the cost breakdown per the three phases stated in the Scope of Services contained within this Request for Proposals (RFP).
 - o Each phase shall include line items for:
 - Each job classification, the unit cost or hourly rate for each job classification, the estimated quantity or number of hours for each job classification, and the extended cost or *unit cost* × *quantity* for each job classification;

- Contingency costs and a brief explanation of these costs; and
- Expenses such as printing, travel, etc.
- O Proposed costs will be subtotaled per phase and then the subtotals will be tallied into a grand total line for purposes of evaluation.
- Provide a copy of license to do business in the State of North Carolina, and certificate of insurance.
- The Consultant, and any proposed subconsultants, if any, must disclose in writing any potential conflict of interest to the Town as a part of their response.

5.2 RESPONSE INSTRUCTIONS

Submit an electronic copy of the response in PDF format to both Robert Tefft, Town Planner, (<u>rtefft@townofweddington.com</u>) and Karen Dewey, Town Administrator/Town Clerk, (<u>kdewey@townofweddington.com</u>). All responses must be received by 4:00 pm EST on Friday, October 21, 2022.

- Responses should be limited to a maximum of 20 pages, not including resumes, examples of prior work product, business license and certificate of insurance. Examples should be provided via web links. Responses exceeding 20 pages may be removed from consideration.
- When received, all responses and supporting materials, as well as correspondence relating to the RFP, shall become the property of the Town and subject to the public records laws of the State of North Carolina. All RFP responses shall be made public as required by G.S. 132 and G.S. 143B-1350.
- In submitting a response, it is understood by the Consultant that the Town reserves the right to accept any response IN WHOLE OR IN PART, to reject any and all responses as non-responsive, and to waive any irregularities or informalities in responses when doing so is in the best interest of the Town. The town reserves the right to negotiate directly with one or more Consultant(s) if the response to this RFP demonstrates a lack of competition; to not award; or if all responses are found non-responsive terminate and reissue the RFP.
- In submitting a response, it is understood by the Consultant that Consultant agrees to abide by the laws of State of North Carolina, Union County, and the Town of Weddington and that Consultant has not colluded with other Consultants in the preparation of their response.
- Any response may be withdrawn or modified by written request of the Consultant, provided such request is received by the Town at the designated email address prior to the date and time set for receipt of responses as noted in the Proposed Timeline section contained herein.
- If a response includes any confidential or propriety information, then such information must be specifically identified as such on every page on which this information appears. After determining that such information is excepted from G.S. 132, data or information so identified will remain confidential to the extent allowed by North Carolina law pursuant to GS 132-1.2 and will be used by Town personnel solely for the purposes of

evaluating responses and conducting contract negotiations. The practice of labeling unqualified pages as confidential, including the bid form, may result in a response being dismissed from evaluation.

- All proposing firms or individuals shall comply with all conditions, requirements, and specifications contained herein, with any departure constituting sufficient cause for rejection of the response. However, the Town reserves the right to change the conditions, requirements, and specifications as it deems necessary.
- No responses will be accepted from any person or organization that is in arrears for any
 obligation to the Town, or that otherwise may be deemed irresponsible or unresponsive
 by Town staff or the Town of Weddington Town Council.
- All prices quoted must be held firm for a period of ninety (90) days following the Response Deadline to allow for evaluation and a contract award period.
- The cost of preparing a response to the RFP will not be reimbursed by the Town.
- No agreements with any selected Consultant shall be binding until a contract is signed and executed by Town Council and authorized representative(s) of the Consultant.
- Any responses that do not adhere to these response instructions may be deemed non-responsive and rejected on that basis. Only information that is received in response to this RFP will be evaluated.
- Delivery of the response to the Town on or before the above date is solely and strictly the responsibility of the Consultant.
- The Town Planner shall be the official authority for determining late bids.
- It is the Consultant's responsibility to read and understand the requirements of this Request for Proposal (RFP).

5.3 DOING BUSINESS

Awarded Consultant shall possess or be able to acquire a license to do business in the State of North Carolina. Awarded Consultant shall produce a certificate of insurance to the Town with the following limits and coverages:

- Workman's Compensation Insurance
 - The awarded Consultant shall maintain during the life of the contract all Workmen's Compensation Insurance as is or may be required by the Laws of North Carolina.
- Automobile Liability Insurance
 - Insurance for all vehicles used in the performance of this contract must be in place at minimum in amounts of at least \$300,000.00 per person and \$500,000.00 per occurrence for personal injury and wrongful death; and at least \$100,000 for property damage; and medical payment coverage of at least \$5,000.00 per occurrence.
- Professional Insurance

Consultant shall also maintain professional liability insurance with minimum limits of \$1,000,000.00 per occurrence, combined single limit for bodily injury and property damage coverage, and shall include premises and operations, independent contractors, products and completed operations, contractual liability, and broad form property damage. The Town shall be named as an additional insured on each of said insurance policies. Consultant shall furnish copies of all such policies and all renewals, terminations, and alterations to the Town on a current basis.

5.4 INTERPRETATIONS AND CLARIFICATIONS

- Requests for information or clarification of this RFP must be made in writing and emailed to Robert Tefft at rtefft@townofweddington.com. E-mail is the preferred method of communication. The RFP name, page number (if applicable), and topic of question should be included with the request. Any and all amendments or revisions to this RFP will be made via written addendum and posted to the Town's website.
- All questions must be received by 4:00 pm EST on October 14, 2022. Replies will be posted to the Town's website. There will be no last date of addendum for this RFP.

6.0 EVALUATION AND AWARD

6.1 SELECTION CRITERIA

Responses will be evaluated and scored by a committee consisting of, at a minimum, the Town Planner and the Town Administrator/Town Clerk. To assist the evaluation committee in determining which response represents the best value for the Town, the evaluation and scoring of responses will be based on the following criteria. The evaluation committee will consider the information submitted in the response and the interview. The evaluation criteria listed below will be used to recommend selection of the Consultant or for the purpose of selecting short-listed Consultant(s) for interview(s). The Town may choose to award without engaging in interviews.

Selection Criteria		Maximum Score
Project	t Approach	30 points
1.	Understanding of the unique elements, issues, concerns and variety of interests, and approach to analyzing and solving key issues with a rational methodology to implementation;	
2.	Clearly identified methods to be used by the Consultant and link methods to specific deliverables identified by the Town; and	
3.	Coordination of the Project, and proposed timeline for completion of the Project.	
Ad	ditional consideration will be given for:	

1.	Effective, proven methodologies that will ensure satisfactory performance and timely completion of the Project.	
Consu	ltant's Overall Experience and Qualifications	25 points
1.	Overall experience and qualification of Consultant, excluding the proposed Project Manager;	
2.	Comparable experience to the requirements in this RFP and for other similar projects;	
3.	Comprehensive organizational descriptions which include professional history of the Consultant and demonstrate a working knowledge or previous performance of the Services required; and	
4.	Comparable experience and resources Consultant provides with respect to land use planning, comprehensive planning, market studies, fiscal impact analysis, and public engagement.	
Aa	ditional consideration will be given for:	
1.	Licenses and certifications held by Consultant personnel, excluding the proposed Project Manager;	
2.	Experience with small town; and	
3.	Feedback obtained from Consultant's client references.	
Projec	t Manager's Overall Experience and Qualifications	20 points
The	e evaluation includes, at a minimum:	
1.	Overall experience and qualification of the proposed Project Manager, including experience outside the Consultant's firm;	
2.	Histories, skillsets, and relevant previous projects that demonstrate experience in and a working knowledge of the Services required in this RFP;	
3.	Overall understanding and knowledge of Comprehensive Planning; and	
4.	Overall understanding and knowledge of G.S. 160D.	
Ad	lditional consideration will be given for:	
1.	Licenses and certifications held by the proposed Project Manager;	
2.	Availability to the Town;	
3.	Proximity to the Town;	
4.	Experience with small town; and	
5.	Feedback obtained from Project Manager client references.	
Intervi	ew	15 points

1. Knowledge demonstrated by the Consultant's representatives who attend the interview. The individual identified in the response as the Project Manager should attend the interview.	
2. Participation from Consultant's representatives.	
Cost Proposal	10 points
Total Possible Score	100 Points

6.2 AWARD

The Town reserves the right to select the response that is most advantageous to the Town and meets the best needs of the Town considering available funding, proposed methodology and process, and other factors deemed relevant by the Town. The Town will make a final selection based on the evaluation committee's recommendation and such other factors as the Town deems to be in its best interest.

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WEDDINGTON North Carolina