



# TOWN OF CHAPEL HILL NORTH CAROLINA

Meeting Date: 06/02/2015

## MEMORANDUM

**TO:** Planning Commission

**FROM:** Mary Jane Nirdlinger, Planning and Sustainability  
John Richardson, Planning Manager for Sustainability  
Megan Wooley, Community Sustainability Planner

**SUBJECT:** Review of Draft Request for Proposals for the Design of a Downtown Master Plan

### Purpose

- This evening, we ask the Planning Commission to review and provide feedback on the draft document titled “Request for Proposals for Creating a Downtown Master Plan.” See Attachment 1.
- In response to the interests described below, we have drafted the attached Request for Proposals (RFP) which requests proposals from urban design and planning consulting firms interested in providing consulting services for a project that will result in adoption and implementation of a small area plan for downtown Chapel Hill.
- The Downtown Master Plan will provide vision and policy direction to guide development and management of the downtown district over time. The Downtown Master Plan is meant to be used by the Town Council, Advisory Boards and Commissions, and Town staff to make improvements and development decisions and when updating ordinances and allocating funds.

### Background

- In the Chapel Hill 2020 Comprehensive Plan, Downtown is identified as “Future Focus Area 1.” Future Focus Areas require continued conversation about how these areas grow and change in the future.
- The Comprehensive Plan also contained five “Big Ideas” – one of which is to “create an entrepreneurial hub in the Rosemary Street corridor.”
- Since the adoption of the Comprehensive Plan, the Town and the Chapel Hill Downtown Partnership conducted community outreach efforts to gather ideas and visions for the future of downtown through the “Downtown Imagined” process. These ideas are outlined in “Downtown Imagined: Community Visions.” [Click here for a copy of the document.](#)<sup>1</sup>
- The next step in this process is to combine these visions with data/analysis about current conditions in downtown – together this information will form the basis for the Downtown Master Plan with an anticipated completion date of spring of 2016.

### Next Steps

- After receiving the Planning Commission’s feedback this evening, we will revise the Request for Proposals document and begin the steps to release the RFP.

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<sup>1</sup> “Downtown Imagined: Community Visions” document on the Downtown Master Planning Process webpage: [www.townofchapelhill.org/town-hall/departments-services/chapel-hill-2020/big-ideas/downtown-master-planning-process](http://www.townofchapelhill.org/town-hall/departments-services/chapel-hill-2020/big-ideas/downtown-master-planning-process)

- After receiving and evaluating the proposals, we will return to the Planning Commission for their guidance in the selection of a firm.

**Attachments**

- Attachment 1: Draft Request for Proposals for Creating a Downtown Master Plan



**Notice of Request for Proposals (RFP)  
For  
Design of Downtown Master Plan**

**BID:** RFP: Insert Here

**TO:** ALL PROSPECTIVE BIDDERS

**FROM:** ZAKIA ALAM, PURCHASING & CONTRACTS MANAGER **SUBJECT:**  
**REQUEST FOR PROPOSALS FOR:**  
**Design of Downtown Master Plan**

**DATE:** RFP: Insert Here

**Project Summary:** The Town of Chapel Hill is requesting proposals from urban design and planning consulting firms interested in providing consulting services for a project that will result in adoption and implementation of a small area plan for downtown Chapel Hill.

<b>Date of Issue:</b>	<b>RFP: Insert Here</b>
<b>Deadline for Questions:</b>	<b>RFP: Insert Here</b>
<b>Responses to Questions Posted:</b>	<b>RFP: Insert Here</b>
<b>Proposal Submittal Deadline:</b>	<b>RFP: Insert Here</b>
<b>Selection Completion:</b>	<b>RFP: Insert Here</b>
<b>Commencement of Project:</b>	<b>RFP: Insert Here</b>

Contact Person: Megan K. Wooley, Community Sustainability Planner II  
Office of Planning and Sustainability, Town of Chapel Hill  
405 Martin Luther King Jr. Blvd.  
Chapel Hill, NC 27514  
919-969-5059; [mwooley@townofchapelhill.org](mailto:mwooley@townofchapelhill.org)

**Questions:** All inquiries and questions about this request for proposals must be submitted in writing by email to Megan Wooley at the following address: [mwooley@townofchapelhill.org](mailto:mwooley@townofchapelhill.org). Questions must be submitted by **RFP: Insert Here** All questions and responses will be emailed to all parties requesting such

information.

## **PROJECT AND AREA DESCRIPTION**

Downtown is a vibrant area of Chapel Hill that has been experiencing growth and change over the past few years. Downtown has a strong core of mostly 2-3 story buildings which extend through the linear Municipal Service District. Adjacent to the University of North Carolina at Chapel Hill campus, downtown stretches on the eastern end of Franklin Street near Henderson Street, and continues through to the west end near the adjoining Carrboro town limits (see map below). Included in downtown is the Rosemary Street corridor. Over the past few years, the Town has approved new development that is more intense than the traditional downtown buildings. Examples include the 140 West and Greenbridge developments—both of which are about 8-10 stories in height. Currently, proposals have been submitted for hotels and additional apartments in the downtown district, and large-scale development is underway at 123 West Franklin.

In June 2012, the Town Council adopted the Chapel Hill 2020 Comprehensive Plan. The Council and community identified “Future Focus Discussion Areas”, which encompass predominantly commercial areas in Town needing additional community conversation about their growth and future development. Downtown Chapel Hill was identified as “Future Focus Area 1”.

The Chapel Hill 2020 Comprehensive Plan also contained five “Big Ideas”, one of which is to “create an entrepreneurial hub in the Rosemary Street corridor.” The process to develop a Downtown Master Plan began in the summer of 2013 and was initially called “Rosemary Imagined.” The community was asked to share their ideas and visions for the future of Rosemary Street. In June of 2014, this process was expanded to “Downtown Imagined” to include all of Downtown. These ideas and visions were gathered together in a document titled *Downtown Imagined: Community Visions*.

Recently, Town staff facilitated the “analysis” phase of the master planning process. During this phase, information was gathered on current conditions to analyze and determine future uses, locations of new uses, and other key land use considerations. Together with the *Downtown Imagined: Community Visions* document; this information will be the basis for the draft Downtown Master Plan.

The Downtown Master Plan will serve as a visioning document to guide development and management of the district over time. Along with the development of a Master Plan the Town will be developing design guidelines for downtown that will encourage consistency between new and traditional buildings. Through both the development of a Master Plan and design guidelines, the Town aims to maintain the character and feel of downtown while also embracing connectivity, new structures, and modern architecture.

The Downtown Master Plan will augment and enhance the work completed by Town staff by providing vision and policy direction that supports the implementation of the overall strategy for downtown. The Plan is meant to be used by the Town Council, Advisory Boards and Commissions, and Town staff in the ongoing process of making decisions, updating ordinances, and allocating funds.



## SCOPE OF PROJECT

The Town is interested in contracting with an urban design and planning consulting firm (Consultant) to provide the following tasks/deliverables:

### 1. Initial Actions

- a. **Background Maps.** The Consultant will work with Town staff to determine what base map information for Downtown will be used for the project. The Town of Chapel Hill will provide base map information determined to be necessary (maps, map layers, and shape files) in an ESRI format.
- b. **News Release.** The Consultant will draft a news release to inform the public about the Master Plan efforts to be undertaken and the Consultant's credentials. The Town of Chapel Hill will edit and issue the release.
- c. **Webpages.** The Consultant will provide text, photographs, maps, renderings, and other images as required for explaining the progress of the project for use on the Town of Chapel Hill's website throughout the project timeframe. Separate project webpages kept by the consultant may also be proposed.

### 2. Phase I: Review of Documents

#### a. Review of Background and Preliminary Documents

- i. The Consultant will review and become familiar with the Chapel Hill 2020 Comprehensive Plan, the Design Guidelines for the Chapel Hill Historic Districts, and other pertinent plans, policies, and regulatory documents and discuss their content with Town staff.
- ii. The Consultant will review and become familiar with the Downtown Imagined: Community Visions document, Downtown Master Plan – Analysis Chapter, Outline for Downtown Master Plan, and any other documents that have been compiled and provided by Town staff.
- iii. The intent of the review of existing plans will be to take into consideration the recommendations from adopted Plans and compiled information from completed community engagement efforts as basis for the Master Plan.

#### b. Provide Evaluation of Big Visions

- i. The Consultant will provide responses to and evaluation of approximately 25 Big Visions that have been compiled by Town staff as reflected by the initial community engagement and Community Visions Document. Big Visions reflect concepts that reflect the objectives and visions of the Community Visions document and Town Council goals.

#### c. Site Analysis and Initial Draft of Master Plan

- i. The Consultant will assess the physical details, architecture, and urban fabric of the study area and surrounding area, building on the work already done by the Town and stakeholders. The Consultant will provide a written analysis and coded map of key findings.
- ii. The Consultant will provide an initial draft of a Master Plan based on initial findings and evaluation.

### 3. Phase II: Continuation of Public Processes

- a. **Public Engagement:** Town staff will design and lead the community engagement process for the Master Plan with Consultant involvement as needed. The process will include input and review by internal and community stakeholders, Planning Commission and other advisory boards and

commissions. Town staff will provide Consultant with comments.

- b. **Presentation and Refining of Drafts:** Later stages of the public process may require the Consultant to present the work generated at public meetings, public hearings, and/or Town Council meetings, as directed by Town staff. Consultant will present options for the plan that reflect the ideas articulated during public engagement meetings.

#### 4. Phase III: Drafting the Master Plan

- a. **Outline of Sections:** To include the following at a minimum:
  - i. Introduction: Including principles, intent, and explanation of process in clear user-friendly language.
  - ii. Vision for Downtown: A unified vision for downtown based on community input.
  - iii. Downtown Today: Data and analysis of current community conditions.
  - iv. Community Visions: Primary objectives for downtown growth based on community input and links to Town Council Goals. Including evaluation of Big Ideas.
  - v. Strengths & Weaknesses: Analysis of where we meet & fail objectives, challenges & threats, strengths we can build on, key problem areas that must be addressed.
  - vi. Implementation: – Strategies to accomplish the identified priorities identify technical changes needed, steps to accomplish those changes, and create draft visual elements to accompany the strategies. This phase should also outline the timeline for completion and, if possible, outline resources needed.

#### 5. Approval Process

- a. **Planning Commission and Town Council:** After the draft documents have been presented and refined by the Consultant based on comments received, the Consultant will present the most current draft to the Planning Commission for a formal review and recommendation. The Consultant may be asked to present the most current draft to the Town Council at both a Public Hearing and Business Meeting; and respond to feedback.
- b. **Additional Revisions.** The Consultant will be responsible for revisions that may become necessary between presentations. Town staff will be responsible for collecting comments, questions, and suggestions for these refinements from various sources and consolidating them into a series of action items for revision or responses. Any further revisions will be completed by the Town staff.

#### 6. Training

- a. **Town Staff.** Following adoption of the Master Plan documents by the Town Council, the Consultant may be asked to train Town staff on applying the Master Plan to the Town's development review processes.

### DELIVERABLES

Following completion of revisions, Consultant will deliver to the Town a final digital version of Master Plan documents; as well as original files of photos, and final digital versions of any maps, graphic images, or other documents required for the Master Plan document. All maps, map layers and shape files must be compatible with ESRI based products, and all editable text documents must be compatible with Microsoft products.

## SCHEDULE

The information below provides a schedule for developing the plan. The Consultant and Town staff will agree on deliverables, a finalized schedule, and other details after a selection is made (including but not limited to public engagement, collaboration with Town of Chapel Hill advisory boards, and training).

The following provides a tentative schedule for the Downtown Master Plan process:

Contract with the consulting team	August 2015
Initial Actions & Phase I Complete: Review, Analysis, First Draft Prepared by Consultant	Sept 2015
Phase II Complete: Community Input conducted by Staff with Consultant	Oct 2015
Phase III Complete : Revised Draft of Master Plan Prepared by Consultant	Nov 2015
Present draft at a Planning Commission meeting	TBD
Phase IV Complete: Community Input Conducted by Staff	Dec 30, 2015
Final revision of edits by Consultant	Jan 2016
Planning Commission meeting for Recommendation on Plan by Consultant	Feb 2016
Public Hearing conducted by Staff	March 2016
Town Council Meeting for possible adoption	April 2016

## SUBMITTAL REQUIREMENTS

*No paper submittals please!* The Proposals should not exceed 25 pages, but brevity should not be at the cost of clarity. Please email your documents to Zakia Alam, Purchasing and Contract Manager, Business Management Department, at [zalam@townofchapelhill.org](mailto:zalam@townofchapelhill.org). Utilize a download service for files exceeding 14 MB in size. Please note that the Town cannot be charged for receipt of any files submitted through a download service. If you do not have access to email or download services you may send a CD containing the PDF of your submittal to:

Zakia Alam, Purchasing and Contract Manager  
Business Management Department  
405 Martin Luther King Jr. Blvd.  
Chapel Hill, NC 27514

1. **Description of Approach:** Up to three pages describing the intended approach and methods for the project. The description should also include the proposed schedule for the work and list of products to be produced, including:
  - a. Tasks to be performed and timeline for each task to be completed,
  - b. Tentative allocation of person days by task,
  - c. Methods the Consultant proposes to use to manage the project and communicate with Town staff and the public as to project progress and conduct of public meetings, and
  - d. Data the consultant expects the Town of Chapel Hill to provide.

The schedule must indicate completion of all work by **RFP: Insert Here**, while the Town prefers that all public meetings and reviews (not including the approval process) occur by **RFP: Insert Here**.

2. **Team Expertise:** Description of the proposed team members from the staff of the Consultant and any

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subcontractors who will be responsible for specific work tasks. Provide specific information on the project manager that would be responsible for the project. Provide general information on others on the team, including their qualifications and specific evidence of relevant experience creating design guidelines. Include names with contact information (addresses, telephone numbers, and email) of three past client references.

3. **Sample Downtown Master Plan Document:** Please include one or more sample downtown master plan documents. If this document is the master plan as originally proposed by the consultant, please also include the master plan as formally adopted by the municipality and a brief explanation of differences between the two.
4. **Project Cost:** The Town estimates a budget of approximately \$40,000 for this project. Submittal should include a detailed description of the proposed cost for the services requested. This should include the hourly rates (inclusive of overhead and profit) for personnel or personnel categories. It should identify the total cost for completing each defined work task separately, including direct and indirect costs. The proposal should be signed by the person responsible for the decisions as to costs and services being offered.
5. **Statement of Start Date:** Statement concerning the firm's ability to begin work with the Town in **RFP: Insert Here.**
6. **Additional Information:** Any additional information that the firm believes may be useful during the selection process. The consultant may propose additions to the scope of work and provide pricing accordingly. Potential items could include staff training on the new design guidelines documents and proposed regulatory updates.

## SELECTION PROCESS

Firms responding to this request should have demonstrated ability in the preparation of downtown master plans. The firm selected must demonstrate a capacity to work closely with the Town staff, various Town advisory boards and commissions, elected officials, and the public during the course of this work.

A selection team of Town staff will evaluate all submittals. Depending on the information and number of proposals received, the Town of Chapel Hill may have an interview process. The Town reserves the right to reject any or all submittals, to waive technicalities, and to be the sole judge of the suitability of consultants to provide the desired services. The Town reserves the right to engage in consultant services that are determined to best meet the interests of the Town. Proposals submitted by Consultants will be evaluated according to the following elements, and the final selection will be the Consultant that provides the best mix of skills, experience, and price:

- Experience in preparing municipal small area plans in other communities
- Experience communities undergoing changes in development patterns
- Experience pairing small area plans with form-based code or other innovative regulatory structures
- Experience in suburban redevelopment areas

- Strength of graphic skills,
- Strength of written and oral communication,
- Experience in identifying, evaluating, synthesizing, and explaining the essential qualities of community planning, design, and character,
- Rationale for proposed fee,
- Willingness to begin work in August 2015, and
- Ability to meet Town insurance requirements

Consultant selection will not be affected by the proposal of add-on items or lack thereof. Any additional items will be negotiated separately if staff decides to pursue them.

**Due Date**

Proposals should be received by Zakia Alam, Town Purchasing and Contract Manager by 3:00 P.M., on Monday, July 6, 2015.

**Questions**

If you should have any questions on the bidding procedures, please contact the Town of Chapel Hill, Business Management Department, Purchasing Division at (919) 969-5022.

Published:

Town of Chapel Hill Website – [www.townofchapehill.org](http://www.townofchapehill.org)

NC Plan Listserv – [ncplan@listserv.unc.edu](mailto:ncplan@listserv.unc.edu)

NCAPA Website – [www.nc-apa.org](http://www.nc-apa.org)

DATE: **RFP: Insert Here**

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**Insurance**

The successful bidder shall procure and maintain during the life of the contract the following insurance coverages:

Worker’s Compensation: Coverage to apply for all employees for statutory limits in compliance with the applicable state and federal laws. The policy must include employer’s liability with a limit of \$100,000 for each accident, \$100,000 bodily injury by disease each employee and \$500,000 bodily injury by disease policy limit.

Comprehensive General Liability: Shall have minimum limits of \$2,000,000 per occurrence combined single limit for bodily injury liability and property damage liability. This shall include premises and/or operations, independent contractors, products and/or completed operations, broad form property damage and explosion, collapse and underground damage coverage, sudden and accidental pollution losses, and a contractual liability endorsement.

Business Auto Policy: Shall have minimum limits of \$1,000,000 per occurrence combined single limit for bodily injury liability and property damage liability. This shall include: owned vehicles, hired and non- owned vehicles and employee non-ownership.

Professional Liability Insurance: The selected firm will be required to furnish proof of Professional Liability insurance coverage in the minimum amount of \$2,000,000.

Special Requirements: The Town of Chapel Hill is to be named as an additional insured on the Comprehensive General Liability policy.

Current, valid insurance policies meeting the above requirements shall be maintained for the duration of the project. Renewal certificates shall be sent to the Town of Chapel Hill thirty (30) days prior to any expiration date. There shall also be a 30 day notification to the Town in the event of cancellation or modification of any stipulated insurance coverage. Certificates of Insurance on an Accord 25 (8/84) or similar form meeting the required insurance provisions shall be forwarded to the Town of Chapel Hill. Wording on the Certificate of Insurance which states that no liability shall be imposed upon the company for failure to provide such notice is not acceptable. Original policies or certified copies of policies may be required by the Town at any time.