



**Notice of Request for Proposals (RFP)  
For  
Future Land Use Map Refinement Project (Comprehensive Plan Update)**

**BID:** Q18-086  
**TO:** ALL PROSPECTIVE BIDDERS  
**FROM:** ZAKIA ALAM, PURCHASING & CONTRACTS MANAGER  
**SUBJECT:** RFP for Consulting Services for the Future Land Use Map Refinement Project (Comprehensive Plan Update)  
**DATE:** November 14, 2017

**INTRODUCTION/PURPOSE**

The Town of Chapel Hill, NC is soliciting proposals for professional services (Consultant) to assist the Town in refining its Future Land Use Map (FLUM). The refined FLUM will be an amendment to the Town's existing Comprehensive Plan, Chapel Hill 2020, adopted in June of 2012.

The goal of the project is to refine the Town's Future Land Use Map so that it aligns with the Town Council's current strategic planning efforts; reflects Town values; honors the community's desire to protect what it loves and add what it needs; and adheres to established goals to create land use tools that are predictable, functional, and intentional.

The purpose of the refined FLUM is to inform and guide policy discussions as the Town undertakes a rewrite of its Land Use Management Ordinance (LUMO) in 2019. The refined FLUM will depict a desired future for the community over the next thirty-one years until 2049, which will be 230 years after the Town's founding in 1819.

Proposals are due by 3:00 PM on December 8, 2017. Please e-mail the proposal as a pdf as well as provide three paper submittals. The e-mail should be sent to Zakia Alam, Purchasing and Contracts Manager, at [zalam@townofchapelhill.org](mailto:zalam@townofchapelhill.org). For questions on the bidding procedures, please contact the Purchasing Division at (919) 969-5022.

All project specific questions must be submitted to Alisa Duffey Rogers at [adrogers@townofchapelhill.org](mailto:adrogers@townofchapelhill.org) by 5 PM on November 20, 2017. Responses to submitted questions will be published in the form of an addendum on the Town's website at [www.townofchapelhill.org](http://www.townofchapelhill.org) by November 27, 2017.

The Town of Chapel Hill reserves the right to reject any and all proposals.

## **BACKGROUND**

### *Town of Chapel Hill*

The Town of Chapel Hill is located in Orange and Durham Counties and is home to the University of North Carolina at Chapel Hill. The Town's population is 59,653, and this population estimate includes those UNC-Chapel Hill students that reside in the Town. The approximate land area within the Town's corporate limits is 20.9 square miles.

### *Chapel Hill 2020*

In 2011, the Town initiated the development of a new comprehensive plan, and in June of 2012, the Town adopted Chapel Hill 2020 with a vision statement of "Connections. Choices. Community." The focus of the Plan is to "map how the community can balance responding to change with protecting what the community values. The community's goal is to purposefully identify and seize opportunities, respond to and correct negative trends, and embrace positive change while preserving the community's fundamental character, values and identity."

### *Strategic Plan*

Since 2012, the Town Council has organized their strategic initiatives through adopted goals that are organized by the theme areas of Chapel Hill 2020. In January of 2017, the Town Council indicated that they would prefer a strategic planning framework. They recognized that, while Chapel Hill 2020 was still an accurate depiction of the community's vision, they wanted an implementation framework that articulated policy goals, objectives and performance measurement metrics. The Town Council instructed staff to develop a Strategic Plan framework and the staff will bring a draft to the Town Council in January, 2018 for review. The expectation is that land use tools such as the Future Land Use Map will implement both the vision of Chapel Hill 2020 and the strategic policy goals included in the Strategic Plan.

### *Land Use Management Ordinance Rewrite Project*

On April 5, 2017, the Town Council initiated a project to protect what the community loves and add what it needs by re-writing the Land Use Management Ordinance and refining its Future Land Use Map. The Town Council requested that the process begin with refining the Future Land Use Map in order to affirm what was not expected to change and to provide an opportunity to have policy level conversations that would inform the rewrite of the ordinance.

From June to August 2017, a team of staff led a project initiation effort to engage staff, stakeholders and advisory boards and commissions in defining the scope and goals of the project. The process resulted in a proposed **goal** that the refined Future Land Use Map and the rewritten Land Use Management Ordinance will be more **predictable, functional, and intentional**.

## CONTEXT

This section provides context information that will be relevant to the Future Land Use Map Refinement Process. The Triangle region of North Carolina is experiencing rapid growth that causes growth pressure on the Town. However, the available undeveloped land in Chapel Hill is considered to be mostly built out and the Town of Chapel Hill has a joint agreement with neighboring jurisdictions that set a rural buffer, where annexation is not allowed. The Town Council has initiated numerous initiatives to manage the impacts of the regional growth on the Town, addressing affordable housing, neighborhood protection, transportation, infrastructure and land use plans. The Future Land Use Map should reflect these investments and initiatives and consider how they inform and support the Council's strategic policy goals. (The link below, for Chapel Hill 2020, provides more information about the current Council goals and the Town's Comprehensive Plan.)

### *GIS Resources*

Included in the Appendix is a list of available GIS resources that may be useful for analyzing the Town's existing conditions as well as for producing the Future Land Use Map scenarios.

### *Plans and Bond Funding*

Following the adoption of Chapel Hill 2020 in 2012, the Town Council took action to implement the plan through work plans, infrastructure master plans, development agreements, rezonings and small area plans. In 2015, a referendum was approved by voters to issue 40.3 million in general obligation (G.O.) bonds to fund public improvements associated with the Council's implementation actions. More information can be found in the Town's Capital Program Report [portal](#) and [map](#).

Chapel Hill 2020 implementation actions are listed in chronological order below:

- 2012: [Adoption of Chapel Hill 2020](#)
- 2013: Adoption of Parks Comprehensive Plan, Greenways Master Plan, Central West Small Area Plan (future focus area)
- 2014: Adoption of Chapel Hill Bike Plan, Stormwater Master Plan and approval of Glen Lennox Development Agreement (future focus area), Ephesus/Fordham Form-Based Code (future focus area), Affordable Housing Rental Strategy
- 2015: Approval of Obey Creek Development Agreement (future focus area)
- 2016: Adoption of the Cultural Arts Plan and approval of the Downtown 2020 Work Plan (future focus area) and Cultural Arts Master Plan and Commercial Development Strategy.
- 2017: Adoption of the West Rosemary Street Development Guide (future focus area) and Mobility Plan

### *University of North Carolina, Chapel Hill*

The University of North Carolina at Chapel Hill is a public research university located in Chapel Hill. Chartered by the North Carolina Assembly in 1789, the University began instruction in 1795, making it one of the oldest public universities in the United States. The main campus occupies about 730 acres in the center of Chapel Hill. The University of North Carolina Health Care System, a not-for-profit system owned by the State of North Carolina is also based in Chapel Hill and its hospitals are located on the University campus. These institutions represent the largest employers in Chapel Hill.

### *Rural Buffer*

On October 13, 1986, the Town and neighboring jurisdictions established a 38,000-acre Rural Buffer. It is defined as land that will remain rural in character, contain low-density residential uses, (one unit per two acres), and not require urban services such as public water and sewage systems. The Rural Buffer falls outside the Town's Extraterritorial Jurisdiction and represents an area where the Town will not grow/annex land. The Rural Buffer has influenced growth patterns in Chapel Hill by constraining development to the already urbanized areas and limiting "greenfield" opportunities.

### *Affordable Housing*

The Town of Chapel Hill leads the state in progressive [affordable housing policies and programs](#) and maintains management of its 336 public housing units. Recently the Town Council received an [update about the current work plan](#) for affordable housing initiatives that includes a public housing master plan and an investment plan to increase funding for affordable housing initiatives. Affordable housing in Chapel Hill is a key issue for the Town Council. An update to the Future Land Use Map will require identifying land use opportunities and tools for reaching affordable housing goals.

### *Transportation and Connectivity*

[Chapel Hill Transit](#) is the second largest transit system in North Carolina, providing over seven million fare-free rides per year. There is considerable local support for public transit in Chapel Hill. In 2012, voters in Orange County approved a half-cent transit tax to support expanded bus service and high end transit investment including bus rapid transit and light rail transit. Since 2012, two major fixed guideway projects are in advanced stages of project development and engineering: North-South Bus Rapid Transit Project and Durham-Orange Light Rail Transit Project. Additionally, Chapel Hill has partnered with Go Triangle, the City of Durham, and Triangle J Council of Governments to begin station area planning for the light rail transit stations. An update to the Future Land Use Map should be coordinated with these planning efforts.

The Town has [many projects underway](#) to improve safety and mobility along sidewalks, streets, trails and greenways. In 2015, the Town passed a [\\$40.3 million bond](#) dedicated to new capital

improvement projects including streetscape, sidewalks, bicycle facilities, greenways, and parks etc. The recently adopted Mobility and Connectivity Plan shows a continued commitment to provide alternative modes of transportation for getting around Town.

### *Neighborhood Character and Special Protection Areas and Districts*

The Town has [special protection areas/districts](#) for natural resources and the built environment that include Resource Conservation Districts and Watershed Protection Districts. Chapel Hill has four National Register Historic Districts, three Local Historic Districts and nine Neighborhood Conservation Districts. These districts signify the importance the community places on maintaining a sense of history, character and environmental sustainability.

## **GOALS FOR FUTURE LAND USE MAP DEVELOPMENT**

The goal of the project is to refine the Town's Future Land Use Map (FLUM) so that it aligns with the Town Council's current strategic planning efforts; reflects and supports Town values; honors the community's desire to protect what it loves and add what it needs; and adheres to established goals to create land use tools that are predictable, functional, and intentional. It is expected that the consulting team will gather a significant portion of the context required for understanding the Town's current land use tools and policies – and clarity on desired outcomes – through in-depth review of existing land use tools, maps and GIS data, major planning reports and documents, public engagement data, etc., along with direct meetings with key Town staff, advisory board members, and stakeholders. The project seeks to engage the public through presentation and testing of focused land use scenarios with the potential to support various Town values and policy goals. The intention of presenting land use scenarios is to offer the public context and education about feasible land use options, understanding of the inherent tradeoffs required for making land use decisions, and opportunities to provide feedback on scenarios presented. Feedback from scenario testing with the public and stakeholders will ultimately inform final refinements to the Future Land Use Map.

## **PROJECT SCOPE**

***Creative and Collaborative Public Engagement:*** The Town is looking for creative firms who bring innovative ideas and technologies to the project. It is anticipated that the consulting team will produce high quality documents and graphics that are user-friendly and engaging. The consulting team should be comfortable presenting information in a succinct graphic format leaving time for community interaction. The Town will prioritize firms that can demonstrate creative and successful civic engagement methods that allow participants to see how their input is connected to the outputs of the project.

***Strategic and Tactical Communications:*** It is anticipated that Town staff will be responsible for establishing an engagement framework that lays out expectations for frequency and types of communications to the public (via project website, Town blogs, educational videos and podcasts, messages from the Mayor, print materials, paid advertising, social media campaigns, etc).

The consulting team will be responsible for collaborating with project team staff on big picture themes and questions that need to be addressed via public communications and may have direct responsibility for managing specific aspects of project communications (e.g., summaries of land use scenarios, surveys conducted through the website, content for blog updates, etc.).

The consulting team will provide regular and ongoing support for project communications by creating and adhering to a visual identity or brand for the project, developing a project website, contributing and adhering to a project communications plan, and regularly providing content for project communications. Project communications will focus on:

- Project branding and providing engaging project communication content.
- Educating the community about local land use efforts and impacts.
- Generating awareness about opportunities to get involved in the FLUM refinement process and attracting participation that statistically represents the Town's demographics and involves people from all segments and geographic areas within the community.
- Providing multiple and different types of input opportunities.
- Ensuring public input is thoughtfully considered throughout the planning and decision-making process.
- Providing a mechanism for showing community members how their input was utilized and synthesized.
- Keeping the community updated on the project's progress.
- The Town maintains a contract with MetroQuest and would make it available to consulting team during the project.

***Process and Schedule:*** The project schedule and associated components, as currently envisioned, are laid out below. Oversight and policy guidance will be provided throughout the project by the Planning Commission, Advisory Boards and Commissions and the Town Council. A project team made up of Town staff will collaborate with the consulting team to execute project steps and seek regular, focused approval and guidance from the Town's Planning Commission as well as periodic, as-needed input from relevant boards and commissions that review land use applications and processes.

<b>Timeline</b>	<b>Required Meetings</b>	<b>Project Component</b>
<i>January 2018</i>	January 10, 2018 Town Council Meeting (1) and staff meetings	Review existing plans, reports, and data related to current and future land use.  Align FLUM process to strategic planning process
<i>February 2018</i>	February TBD (2)	Public Project Kickoff; Present SWOT analysis
<i>March – April 2018</i>	Early March TBD (3 day community meeting blitz to cover geographic areas and times of day)	Test Future Land Use Map Scenarios
<i>May – June 2018</i>	May: Community meeting (1), Joint boards and commission meeting (1) June: Planning Commission meeting (1) and Town Council Meeting (1)	Create and review Future Land Use Map draft
<i>September-October 2018</i>	Planning Commission meeting (2) and Town Council Meeting (2)	Adopt refined Future Land Use Map
<i>Ongoing</i>		Strategic and tactical communications support

***Project Components:***

1. **Review existing plans, reports, and data related to current and future land use** (*January 2018*). The Town will provide extensive resources related to current tools, data, policies, and plans about land use in the community in order for the consulting team to establish the context necessary for creating testable land use scenarios and for refining the FLUM. The consultant team will review materials to understand community vision and plans (related to economic development, transportation, affordable housing, etc.) that have articulated goals for various land uses. The consulting team will create a Strength, Weakness, Opportunities and Threats (SWOT) analysis (or similar type of analysis) based on this information and interviews with key members of staff.

- Assumptions: Substantial parts of the existing FLUM will not change. Refinement options will be based on opportunities to advance Council’s strategic policy goals.
  - Deliverables: SWOT analysis with prioritization rubric and report of findings from review of existing plans, reports, and data related to current and future land use opportunities.
  - Communications: Create project identity, populate website, and establish overall communications plan
2. **Align FLUM process to strategic planning efforts** (*January 2018*). The Town Council recently requested that the Town Manager develop and execute a strategic planning process for all Town operations. In January 2018, staff will present to Council a Strategic Plan draft containing strategic policy goals, objectives, actions, and performance measures. The draft strategic policy goals and Council’s feedback to the strategic policy goals is expected to guide and inform refinement of the FLUM. As staff work with advisory boards and Council to adopt a strategic planning framework in February and March, the consultant team will be expected to track progress and incorporate feedback from these sessions into FLUM communications and land use scenario-testing processes.

The Council will use their **January 10, 2018** Work Session to affirm strategic policy goals for how to achieve the Town’s vision using the Chapel Hill 2020 Comprehensive Plan and other strategic planning content. The consultant team will need to be present for that work session to hear Council’s conversation, meet with staff, and review content.

- Assumptions: FLUM changes will only be considered in relation to how those changes would advance strategic policy goals
  - Deliverables: Preliminary land use scenario framework
  - Communications: Create project identity, populate website, and establish overall communications plan
  - Meetings: January 10, 2018 Council Work Session
3. **Public project kickoff** (*February 2018*). Public engagement will begin in February 2018 with a project website, informational kickoff event, and supporting communications campaign to publicize and frame the FLUM refinement process. The goal of the kickoff is to provide an orientation to the project for the public that includes education about what a FLUM is and how it is used; project goals and assumptions; and a project process description including information about how public input will be used.
- Assumptions: Informational/educational event to provide education about the role and function of a FLUM, as well as the project goals, process, milestones
  - Deliverables: Kickoff presentation graphics and materials that can be shared with public as orientation to the project.
  - Communications: Website launches with project identity; public project kickoff Website and social media-ready updates; Summary of feedback, if applicable



- Meetings: February project kickoff event
4. **Test land use scenarios** (*March – April 2018*). The consulting team will be responsible for developing, in collaboration with project staff, FLUM scenarios that identify opportunities to implement the Council’s draft strategic policy goals and established elements of the community’s vision.

The land use scenarios should be presented visually, provide corresponding market analysis information, and help stakeholders evaluate development options analytically by understanding how prioritizing different strategic policy goals result in different outcomes in the built environment. The consultant will provide engagement tools to allow the community to react to land use scenarios through open community meetings, stakeholder focus groups, and targeted outreach to communities traditionally under-represented in community meetings, and through online tools.

With logistical support from the project team, the consulting team will establish expectations for, design, and facilitate a three-day blitz of interactive community meetings for scenario testing. In addition to evaluating scenarios at community meetings, we seek use of online engagement activities that allow users to better understand the tradeoffs necessary when evaluating land use options. In their proposal, the consulting team will describe how they will successfully manage interactive meetings for different populations, approaches for online scenario testing, what questions are asked during scenario testing, how responses are captured, how feedback will be used to build content for the draft FLUM review phase, etc.

- Assumptions: Scenarios will be presented visually and offer opportunity options related to the Council’s draft strategic policy goals. Engagement tools will facilitate community input and the consultant will be able to demonstrate how input was used in developing the draft FLUM.
  - Deliverables: Visual FLUM scenarios, interactive engagement tools, communication material, feedback summaries
  - Communications: Website- and social media-ready updates, on-line engagement tools, summary of feedback
  - Meetings: Three-day blitz of interactive community meetings for scenario testing.
5. **Create and review Future Land Use Map draft** (*May – June 2018*). The consulting team will synthesize feedback from scenario testing into a FLUM draft for further stakeholder and community consideration. The consulting team will be able to demonstrate how input from the scenario testing informed the draft. The consulting team will present options at community meetings and offer mechanisms for online feedback. The Draft and feedback will be presented to boards and commissions and to the Town Council.
- Assumptions: The consultant team will have methods for summarizing feedback and reflecting how input was used to create the draft FLUM. The consultant team

will capture feedback about the draft that can be shared in a presentation to Council with recommendations for options.

- Deliverables: Draft Visual FLUM, engagement tools, communication material, feedback summaries
- Communications: Website and social media-ready updates, on-line engagement tools, summary of feedback
- Meetings:
  - May: Meetings to include community meetings as well as Joint boards and commissions meeting
  - June: Planning Commission meeting and Town Council meeting

6. **Adopt refined Future Land Use Map** (*September-October 2018*). The consulting team will use feedback gathered about the FLUM draft to create a final FLUM to present to the Planning Commission and Town Council for consideration in October 2018. The consulting team will synthesize feedback from the FLUM draft input and be able to demonstrate how input informed the final Future Land Use Map.

- Assumptions: The consultant team will have methods for summarizing feedback and reflecting how input was used to create the final FLUM. The consultant team will capture feedback about the draft that can be shared in a presentation to Council with recommendations for options.
- Deliverables: Final FLUM, engagement tools, communication material, feedback summaries
- Communications: Website- and social media-ready updates, on-line engagement tools, summary of feedback
- Meetings: Joint boards and commissions meeting (to be combined with Planning Commission meeting), Planning Commission meeting (2) and Town Council meeting (2)

***Deliverables:***

**Types of FLUM(s):**

In preparation for this RFP, the Town has examined many different types of FLUMs, and while we have not settled on any one type as our desired product, we do feel that a single parcel based map may not adequately depict the Town's future state. We are open to utilizing a series of maps, node based maps, and/or a FLUM in combination with character/place types for certain areas of Town.

We seek deliverables that are:

- Simple – Easy to understand by the layperson and avoid jargon.
- Visual – Any key concepts that may accompany the FLUM map(s) must be illustrated using visually interesting graphs, charts, and infographics.
- Transferable – Easily downloaded and/or distributed and accessible across a variety of media platforms (including Adobe PDF versions).

- Creative – We encourage innovation in our deliverables and our engagement efforts. We are open to innovative uses of technology including but not limited to 3D and Virtual Reality technology.

Key project deliverables will include:

- Development of project brand identity and website
- Written project updates for all project components.
- SWOT analysis and report of findings from review of existing plans, reports, and data related to current and future land use opportunities
- Preliminary land use scenarios for Town staff review and finalized land use scenarios for testing in interactive community meetings and online engagement.
- FLUM draft for staff, Planning Commission, and Council review and revised FLUM draft for subsequent community meetings.
- Presentation graphics and handouts for public meetings (to be determined prior to the meetings).
- On-line engagement tools (MetroQuest and others)
- GIS layers and maps, materials in ArcGIS compatible format for future maintenance and updates by Town staff.
- Website and social media-ready updates and drafts for public posting.
- Final map or maps for review by the Planning Commission and approval and adoption by the Town Council.
- At the end of the project, final digital versions of all project documents as well as original files of photos or other images used throughout the development of the FLUM. All digital versions of the FLUM(s) must be compatible with ArcGIS.

## **CONSULTING TEAM AND EXPERTISE**

The Consultant should possess a strong knowledge of land use, redevelopment, and urban design.

The Consultant would ideally have experience working with similar projects, and the Town is seeking a firm who can creatively push the envelope on what would be achievable given the Town's built environment and its desire to create a refined FLUM that is policy driven and collaborative.

The Consultant should include appropriate staffing and technical expertise. The Consultant Team may be a single multi-service firm, or comprised of a planning lead with sub-consultants as required.

The consulting team should include expertise about real estate economics such that they can provide market analyses as part of the scenario testing.

In addition to technical expertise necessary to complete the project, the project team must demonstrate that they can contribute:

- A high level of creativity and use of graphics in the production of innovative and user-friendly materials;
- The ability to effectively communicate ideas to a wide range of audiences;
- **Expert facilitation** of and collaboration with community advisory groups and stakeholders;
- Experience in developing and implementing innovative community engagement programs and events;
- Availability and capability to move the project forward and the flexibility to adjust quickly to changes in a complex community environment; and,
- Analytical capabilities to build FLUM Scenarios.

## **SUBMITTAL REQUIREMENTS**

This section specifies the format and minimum content requirements for information required to be submitted in each proposal. Firms may at their discretion include additional information which they consider relevant to ensure a full and proper evaluation.

### 1. Guidelines

- All questions related to the project specifics must be submitted to Alisa Duffey Rogers at [adrogers@townofchapelhill.org](mailto:adrogers@townofchapelhill.org) by 5 PM on November 20, 2017 with “FLUM Refinement” in the subject line. All responses to submitted questions will be published in the form of an addendum on the Town’s website at [www.townofchapelhill.org](http://www.townofchapelhill.org) by November 27, 2017.
- Proposals are due by 3:00 PM on December 8, 2017. Please e-mail the proposal as a pdf as well as provide three paper submittals. The e-mail should be sent to Zakia Alam, Purchasing and Contracts Manager, at [zalam@townofchapelhill.org](mailto:zalam@townofchapelhill.org) with “FLUM Refinement” in the subject line. The paper copies should be mailed with “ FLUM Refinement” marked on the exterior of the envelope:

Zakia Alam, Purchasing and Contracts Manager  
405 Martin Luther King Jr. Blvd.  
Chapel Hill, NC 27514

- For questions on the bidding procedures, please contact the Purchasing Division at (919) 969-5022.

## 2. Submittal Format

- The proposal should be organized to reflect the Submittal Content requirements described below. The sections of the submittal should be clearly identifiable. The Town will not provide any reimbursement for the cost of developing or presenting the submittals in response to this solicitation. Failure to include any requested information may have a negative impact on the evaluation and/or may result in the rejection of the firm's submittal.
- Page size shall be 8 ½" x 11".
- No more than 20 pages, single sided. This limitation applies to the portion of the proposal that addresses the submittal content described below. Additional generic information about your firm such as brochures and videos may be submitted as background information.

## 3. Submittal Content - In order to be considered, submit the following information:

- a. A narrative describing the firm's approach to accomplishing this project including;
  - Description of your method of building consensus in contentious environments;
  - Description of your approach to facilitating community meetings and interactive engagement tools and approaches used in community meetings;
  - Description of your approach for using on-line engagement tools;
  - Description of your approach for FLUM scenario building and testing based on strategic policy goals;
  - Description of your approach to generate awareness about involvement opportunities.
- b. Examples of the following:
  - Project websites;
  - Project identity (branding);
  - FLUM Scenario testing;
  - Engagement activities used in community meetings;
  - How to reflect community input and takeaways; and,
  - Future Land Use Maps.
- c. Consultant Qualifications;

- d. Description of who specifically from the Consultant's team will be working on this project as well as any subcontractors who will be responsible for specific tasks. Provide specific information on the skill set of the individuals with regard to their areas of responsibility in relation to this project and specific evidence of relevant experience. An organizational chart should be included as well as resumes for each individual;
- e. Include timeframes for each work element, target dates for public meetings, and dates for the completion of preliminary and final documents with a completion date not later than October 31, 2018;
- f. Itemize costs to include:
  - The person assigned to the work, the title/rank (organizational level) of the person in the organization, hourly rate, and number of hours worked;
  - The reimbursable expenses to be claimed;
  - The itemized costs must be totaled to produce a contract price. If awarded a contract, a proposer is bound by this price in performing the work. The contract price may not be exceeded unless the contract is amended to allow for additional costs;
  - If awarded a contract, the firm may not change the staffing assigned to the project without approval by the Town. However, approval will not be denied if the staff replacement is determined by the Town to be of equal ability or experience to the predecessor; and,
  - Consultant Fee Schedule. The method of billing must be clearly stated in writing. The practice of the Town is to pay upon completion of work. The Town will consider paying on a periodic basis as substantial portions of the work are completed and satisfactory.
- g. At least three (3) client references with phone numbers, a contact name, and business address where similar services were provided and work completed within the last five (5) years;
- h. A list of comparable projects that include work accomplished; and,
- i. Complete and agree to the "Contract" form in the Appendix.

## **SELECTION PROCESS**

A selection team of Town staff will evaluate all submittals. The Town will have an interview process. Proposals submitted by Consultants will be evaluated according to the following elements, and the final selection will be the Consultant team that provides the best mix of skills, experience, and price.

### *Selection Criteria:*

- Firms responding to this request should have demonstrated ability in the preparation of municipal comprehensive plans or plan updates. The firm selected must demonstrate a capacity to work closely with the Town staff, Town Boards/Commissions, elected officials, and the public;

- Public facilitation capabilities and experience working with the public, steering committees, and stakeholders in diplomatically crafting solutions to be incorporated into the work products as well as outstanding and creative experience in civic engagement through a variety of platforms, outlets, and methods;
- Clear understanding of the Town's goals, objectives, and needs of the FLUM refinement project;
- Ability to produce high quality documents and graphics that are user friendly, yet able to be flexibly updated into the future;
- Examples/case studies where engaging outreach and facilitation led to development of successful solutions, particularly among diverse groups;
- Ability to make high quality oral and visual presentations;
- Creative and successful use of technology in the FLUM refinement process as well as civic engagement processes;
- Ability to listen, be flexible, and follow and/or implement direction and/or ideas and concepts;
- Ability to adapt throughout the FLUM refinement process for the inevitable changes and, ideas, and items that are raised throughout the process;
- Ability of consultant team to demonstrate initiative, motivation, and knowledge of the Town of Chapel Hill and a desire to produce the highest quality Future Land Use Map for our community;
- Project schedule; and,
- Review of references, experiences, and work products for similar projects.

Consultant selection will not be affected by the proposal of add-on items or lack thereof. Any additional items will be negotiated separately if Town staff decides to pursue these. Town staff and the Consultant will agree on deliverables, a finalized schedule, and other details after a selection is made.

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.

## **BUDGET**

The cost allocated to this project is approximately \$90,000-\$100,000. The final amount may be negotiated with the selected Consultant as part of the final contract for this FLUM Refinement project. If the Town is unable to negotiate a satisfactory contract with the selected Consultant, negotiation with that Consultant will terminate and the Town may select another firm. The funds for this project were budgeted and allocated when the Town adopted the budget for FY2018 in June of 2017.

## **SCHEDULE**

November 14, 2017 – RFP Issued; published on Town website

November 20, 2017 – Deadline to submit questions

November 27, 2017 – Responses to questions posted as an addendum on Town website

December 8, 2017 – RFP submittal due by 3:00 PM

December 15, 2017 – Interviews of Finalists

December 19, 2017 – Notification of Selected Firm

January 10, 2018 – Attendance at Town Council Work Session (Attendance required, but no presentation is necessary.)



# APPENDIX

STATE OF NORTH CAROLINA  
COUNTY OF ORANGE

CONTRACT FOR  
{DESCRIPTION OF SERVICES TO BE PROVIDED  
UNDER THIS CONTRACT

This Contract is made and entered into by and between the "Town of Chapel Hill", herein "Town", and "{Contractor's Full Legal Name}", herein "Contractor", for services hereinafter described for the Town of Chapel Hill. This Contract is for {Description of Services to be Provided Under This Contract}.

WITNESSETH

That for and in consideration of the mutual promises and conditions set forth below, the Town and Contractor agree:

1. Duties of the Contractor: The Contractor agrees to perform those duties described in Exhibit A attached hereto and incorporated herein by reference.
2. Duties of the Town: The Town shall pay for the Contractor's services as set forth in Exhibit A.
3. Fee Schedule and Maximum Sum: Contract amount is not to exceed {insert a not to exceed amount}. Payment shall be made according to Exhibit A.
4. Billing and Payment: The Contractor shall submit a bill to the Town for work performed under the terms of this Contract. The Contractor shall bill and the Town shall pay the rates set forth therein. Payment will be made by the Town within thirty (30) days of receipt of an accurate invoice, approved by the contact person or his/her designee.
5. Indemnification and Hold Harmless: The Contractor agrees to indemnify and hold harmless the Town of Chapel Hill and its officers, agents and employees from all loss, liability, claims or expense (including reasonable attorneys' fees) arising from bodily injury, including death or property damage to any person or persons caused in whole or in part by the negligence or willful misconduct of the Contractor except to the extent same are caused by the negligence or misconduct of the Town.
6. Insurance Provisions: The Town requires evidence of Contractor's current valid insurance (if applicable) in the amounts stated below during the duration of the named project and further requires that the Town be named as an additional insured for Comprehensive General Liability and Business Automobile policies. The required coverage limits are: 1) Comprehensive General Liability and Business Automobile - \$1,000,000 per occurrence, and 2) Workers' Compensation - \$100,000 for both employer's liability and bodily injury by disease for each employee and \$500,000 for the disease policy limit.

7. Non-Discrimination: The Contractor contractually agrees to administer all functions pursuant to this Contract without discrimination because of race, creed, sex, national origin, age, economic status, sexual orientation, gender identity or gender expression.
8. Federal and State Legal Compliance: The Contractor must be in full compliance with all applicable federal and state laws, including those on immigration.
9. E-Verify: The Contractor shall comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes. Further, should Contractor utilize a subcontractor(s), Contractor shall require the subcontractor(s) to comply with the requirements of Article 2, Chapter 64 of the General Statutes. Pursuant to North Carolina General Statute § 143-133.3 (c)(2), contracts solely for the purchase of apparatus, supplies, materials, and equipment are exempt from this E-Verify provision.
10. Amendment: This Contract may be amended in writing by mutual agreement of the Town and Contractor.
11. Termination: Either party may terminate this Contract at any time by giving the other party thirty (30) days written notice of termination prior to the end of the term as described herein.
12. Interpretation/Venue: This Contract shall be construed and enforced under the laws of North Carolina. The courts and the authorities of the State of North Carolina shall have exclusive jurisdiction over all controversies between the parties which may arise under or in relation to this Contract. In the event of any dispute between the parties, venue is properly laid in Orange County, North Carolina for any state court action and in the Middle District of North Carolina for any federal court action. Contrary to any provision that may be contained in any exhibit attached hereto the Town shall not consent to 1) resolving any dispute by means of arbitration and/or 2) waiver of a trial by jury.
13. Preference: In the event that the terms of any exhibit attached hereto are not consistent with terms of this Contract, this Contract shall have preference; provided that where either any exhibit attached hereto or this Contract establishes higher standards for performance by either party, the higher standard, wherever located, shall apply.
14. Severability: The parties intend and agree that if any provision of this Contract or any portion thereof shall be held to be void or otherwise unenforceable, all other portions of this Contract shall remain in full force and effect.
15. Assignment: This Contract shall not be assigned without the prior written consent of the parties.
16. Entire Agreement: This Contract shall constitute the entire agreement of the parties and no other warranties, inducements, considerations, promises, or interpretations shall be implied or impressed upon this Contract that are not expressly addressed herein. All prior agreements, understandings and discussions are hereby superseded by this Contract.

17. Non-Appropriation Clause: Contractor acknowledges that the Town is a governmental entity, and the Contract validity is based upon the availability of public funding under the authority of its statutory mandate.

In the event that public funds are unavailable and not appropriated for the performance of Town's obligations under this Contract, then this Contract shall automatically expire without penalty to the Town, thirty (30) days after written notice to Contractor advising of the unavailability and non-appropriation of public funds. It is expressly agreed that the Town shall not activate this non-appropriation provision for its convenience or to circumvent the requirements of this Contract, but only as an emergency fiscal measure during a substantial fiscal crisis, which affects generally its governmental operations.

18. Construction Project Related Sales Tax: If applicable, the Contractor shall furnish the Town certified statements setting forth the cost of all materials purchased from each vendor and the amount of North Carolina sales and use taxes paid thereon. In the event the Contractor makes several purchases from the same vendor, the Contractor's certified statement shall indicate the invoice number, the inclusive dates of the invoices, the total amount of the invoices, and the North Carolina sales and use taxes paid thereon. The Contractor's certified statement shall also include the cost of any tangible personal property withdrawn from the Contractor's warehouse stock and the amount of North Carolina sales or use tax paid thereon by the Contractor. The Contractor shall furnish such additional information as the Commissioner of Revenue of the State of North Carolina may require to substantiate a refund claim by the Town for sales or use taxes. The Contractor shall obtain and furnish to the Town similar certified statements by the subcontractors. The certified statements to be furnished shall be in the form of the standard CONTRACTOR'S SALES TAX REPORT and shall be submitted with each request for payment. The Town will not make payment to the Contractor until the CONTRACTOR'S SALES TAX REPORTS ARE SUBMITTED. Any and all refunds received by the Town of said taxes shall remain with the Town, and the Contractor shall not be entitled to such refund.

19. Term: This Contract, unless amended as provided herein, shall be in effect until { \_\_\_\_\_ }, 20{ \_\_\_\_\_ }.

[SIGNATURES ON FOLLOWING PAGE.]

This Contract is between the Town of Chapel Hill and {Contractor's Full Legal Name} for {Description of Services to be Provided Under This Contract}.

IN WITNESS WHEREOF, the parties hereto cause this agreement to be executed in their respective names.

**{CONTRACTOR'S FULL LEGAL NAME}**

\_\_\_\_\_

SIGNATURE

\_\_\_\_\_

PRINTED NAME & TITLE

\_\_\_\_\_

WITNESS

\_\_\_\_\_

PRINTED NAME & TITLE

**TOWN OF CHAPEL HILL**

\_\_\_\_\_

DEPARTMENT HEAD OR DEPUTY/TOWN MANAGER

\_\_\_\_\_

PRINTED NAME & DEPARTMENT

ATTEST BY TOWN CLERK:

\_\_\_\_\_

TOWN CLERK

TOWN SEAL

**Town Clerk** attests date this the \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Approved as to Form and Authorization

\_\_\_\_\_

TOWN LEGAL STAFF

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

\_\_\_\_\_

FINANCE OFFICER

\_\_\_\_\_

DATE

## **GIS Resources**

### **Base Data**

1. Address Points
2. Neighborhoods
3. Structures
4. Parcel information
  - a. Town-Owned Property
  - b. Orange County Easements
  - c. Orange County Misc. Parcel Lines
  - d. Orange County Parcels
  - e. Durham County parcels

### **Regulatory Considerations**

1. Corporate Limits
2. Jurisdictional Limits
3. Urban Service Boundary
4. Joint Planning Jurisdiction
5. Jordan Lake Watershed Protection District
6. Significant Natural Heritage Areas
7. FEMA Floodplain Boundaries
8. Downtown Fire District
9. Overlay Zoning Districts
10. Zoning Districts
11. Town Owned Property
12. Carrboro Corporate Limits
13. Carrboro Zoning Jurisdiction
14. 2 Foot Contours

### **Infrastructure**

1. Stormwater Infrastructure
  - a. Inlets
  - b. Junction Boxes
  - c. Miscellaneous Structures
  - d. Pipe Entrances Without a Box
  - e. Outfalls and Other Pipe Exits
  - f. Stormwater Manholes
  - g. Ditches
  - h. Stormwater Lines

2. OWASA Infrastructure
  - a. Manholes
  - b. Hydrants
  - c. Water Valves
  - d. Gravity Sewer Mains
  - e. Pressurized Sewer Mains
  - f. Water Lines
3. Impervious Surface
4. Underground Storage Tanks

## **Transportation**

1. Street Classifications
2. Street Maintenance
3. Chapel Hill Transit
  - a. Bus Stops
  - b. Weekday Routes
4. MCP Network 8.8
  - a. Existing Bike and Greenway Facilities
  - b. Existing Sidewalks
  - c. New Proposed Bike and Greenway Facilities
  - d. Proposed Bike Plan and Greenways Plan
  - e. Proposed Sidewalks
5. Bus Regional Transit
  - a. BRT Stops
  - b. BRT Buffer
6. Durham Orange Light Rail Transit, February 2016
  - a. Park and Ride Lots
  - b. D-O LRT Stations
  - c. D-O Alignment
  - d. Aerial Sections of D-O LRT Alignment
  - e. Rail Operations and Maintenance Facility
7. Parking Demand Model

## **Demographics**

1. 2016 USA Population Density
2. USA Census Populated Places
3. 2016 USA Average Household Income

4. 2016 USA Median Household Income
5. 2016 USA Tapestry Segmentation
6. Social Vulnerability 2010
7. 2016-2021 USA Population Growth

### **Services**

1. CHCCS Facilities
2. Elementary Attendance Zones
3. Middle School Attendance Zones
4. High School Attendance Zones
5. Solid Waste
  - a. Proposed Collection Changes
  - b. Sanitation Collection Changes
6. Recycling (Orange Co.)
  - a. Monday Recycle Collection
  - b. Tuesday Recycle Collection
  - c. Wednesday Recycle Collection
  - d. Thursday Recycle Collection
  - e. Friday Recycle Collection

### **Housing**

1. Subsidized Housing Units
2. Housing and Community Development Facilities
3. Residential Sale Prices

### **Chapel Hill 2020**

1. Letter Points
2. CH 2020 Focus Areas
3. Light Industrial Opportunity Area
4. Development Opportunity Areas
5. CH Land Use Plan 2012-06-25

### **Other Land Use Data**

1. Existing Land Use 06-13-2011
2. Orange County Land Use Data
3. Connect 2045