

Request for Proposals
for a
Unified Development Ordinances (UDO)
Code Assessment



Winston-Salem

for the City of Winston-Salem/Forsyth County
Planning and Development Services Department

Contact Information

Kirk Ericson

Principal Planner

336.747.7045

kirke@cityofws.org

Private firms are invited to submit RFP responses for providing the requested professional consulting services to the City no later than **5:00 pm, September 29, 2017**. Responses not delivered by this deadline will not be considered.

The submittal, in PDF format, should be submitted to Kirk Ericson, Principal Planner, at the following email address: kirke@cityofws.org

All questions must be submitted in writing to kirke@cityofws.org by 5:00 pm, September 15, 2017 and will be responded to via addendum.

Overview

The City-County Planning and Development Services Department invites qualified firms to submit proposals for consulting services to complete a comprehensive Code Assessment of the Winston-Salem/Forsyth County Unified Development Ordinances (UDO). The UDO includes regulations related to zoning and land use; subdivision of land; historic preservation; and environmental protection. The code was adopted in 1994 and has been subject to nearly 300 text amendments over the past 23 years. While these amendments have been necessary to keep the code up-to-date with community expectations and, to some extent, planning best management practices, these amendments have also made the ordinance more unwieldy and difficult to navigate. The City-County Planning Board wishes to conduct a Code Assessment to determine what *non-substantive* changes can be made to improve the user-friendliness and organization of the UDO.

Project Intent

The primary objective of this Code Assessment is to examine the existing UDO and outline ways to improve its user-friendliness and organization without changing the substance of its regulations. The Code Assessment will seek to remove unnecessary, redundant regulations or regulations which are no longer effective. It will aim to make the ordinance easier to use by developers, citizens, elected officials, and staff by examining whether the code is understandable and logically organized. It will look for conflicting regulations, or regulations which run counter to one another.

While the request for this Code Assessment is for the purpose of proposing only organizational or other non-substantive remedies at this time, it would be helpful to know if the consultant sees substantive ordinance changes that could be made in the future that would assist in shaping the community to be more consistent with our *Legacy* Comprehensive Plan or best management practices used by peer cities.

The consultant will work directly with the Planning and Development Services staff throughout the Code Assessment process, giving monthly updates via email or telephone on the progress of the project. The consultant is also responsible for satisfying internal and external stakeholder input expectations. Additionally, the consultant will be expected to present the final Code Assessment report to the Planning Board in May 2018.

Scope of Services

Staff anticipates a 7-month timeline for the following scope of services, which was developed to provide guidance and communicate Planning Board expectations.

Project Management

The consultant will manage all technical aspects of the Code Assessment. The consultant will also provide bi-weekly email reports to the Planning and Development Services staff on project progress, summaries of activities, and any obstacles.

Public Involvement

The Planning Board encourages creative public involvement that will result in meaningful input from a range of stakeholders including neighborhood residents, developers, design professionals, institutions and community organizations, elected and appointed officials, and local government staff. Strategies should be designed to engage a broad and diverse audience and include outreach to non-English speaking residents.

The consultant should develop an outreach strategy that includes the following:

- A hands-on approach to gathering public input on the current UDO user experience.
- One (1) in-person meeting with internal stakeholders at the start of the Code Assessment process

to solicit comments on the usability/user-friendliness and challenges with the current code from staff of various City and County departments (such as Planning and Development Services, Engineering, Transportation, Stormwater, and legal staff).

- A minimum of one (1) focus group meeting where the consultant will solicit comments from key stakeholders such as neighborhood advocates, developers, designers, elected officials, and others on the usability/user-friendliness and challenges with the current code.
- One (1) in-person meeting where the consultant presents and solicits feedback on the draft code assessment recommendations from internal stakeholders with various City and County departments (e.g. Planning and Development Services, Engineering, Transportation, Stormwater, and legal staff).
- One (1) public meeting, with the consultant being responsible for all printed handouts, displays and materials, at the end of the report drafting process to allow public stakeholders to review and comment on the recommendations of the Code Assessment prior to the May 2018 Planning Board meeting.
- Presentation of recommendations at one (1) meeting of the City-County Planning Board, anticipated to take place in May 2018.

Deliverables

The following items are to be provided to staff as part of this project:

- Draft Code Assessment documents. The consultant will develop draft Code Assessment documents which will be reviewed by staff and relevant stakeholders. The Code Assessment should reference specific UDO sections which are recommended to be modified and a description of the nature of the modifications, including suggested revised ordinance language where necessary.
- Any relevant graphics, illustrations, and photos developed throughout the Code Assessment process.
- All materials created for public and Planning Board meetings.
- Any meeting summaries, sign-in sheets, comment sheets, project status reports, PowerPoint presentations, maps, and handouts generated throughout the Code Assessment process.
- Final Code Assessment document. The consultant will develop a final Code Assessment report document that reflects comments on the draft document, as well as any future substantive ordinance changes that the consultant recommends be considered.
 - The format for the final report should be 8.5”x11”
 - The final plan should be submitted as both a high resolution PDF file for printing and a reduced resolution PDF file for web posting.

Schedule

September 29, 2017: Deadline for proposal submissions, due at 5:00 pm.

October 13*, 2017: Staff team review of proposals and selection of consultant

December 8*, 2017: In-person consultant meeting with internal stakeholders to solicit comments on the UDO as it currently exists

March 1*, 2018: Initial draft report due to Planning and Development Services staff

March 22*, 2018: Review by interdepartmental stakeholder committee

April 13*, 2018: Revised draft incorporating internal stakeholder comments due to staff

April 27*, 2018: Public meeting with stakeholders to review and comment on the recommendations of the Code Assessment

May 24, 2018: Presentation of final draft Code Assessment report to Planning Board

These tasks are not expected to take place on these specific dates – rather, these milestones are expected to be completed by these dates

Subcontracting

The selected consultant may use subcontractors to perform work outlined in this proposal subject to their meeting the required experience or professional qualifications. Qualifications and experience of proposed subcontractors (or team) shall be submitted as a part of the proposal. The proposal shall clearly note the type of work they will be performing and the approximate percentage of the total work.

Minority/Women Business Enterprise (M/WBE) Program Participation

A **10%** goal for participation by minority/women-owned businesses has been established for this RFP. A Proposer may meet this goal through the participation of M/WBE sub-consultants and/or through his/her own performance on the project if the Proposer is a minority/woman-owned firm. If it is the normal practice of the proposer to perform all elements of this type of service with its own workforce and without the use of sub-consultants, the proposer must affirm that, if they do employ any sub-consultants during the contract, that they will be subject to the M/WBE goals originally established for this request for letters of interest. “Affidavit A”, attached herein, must be submitted with your letter of interest if your firm will employ any sub-consultants on this project. “Affidavit B” – Intent to Perform Contract with Own Workforce, also attached herein, must be submitted with this proposal only if the proposer intends to perform 100% of the work required for the contract without the use of sub-consultants. If a properly executed affidavit is not submitted, your proposal will not be considered. The City of Winston-Salem is committed to providing opportunity for small and disadvantaged businesses (DBE) to perform on its contracts. The selected firm, subconsultant and subfirm shall not discriminate on the basis of race, religion, color, national origin, age, disability or sex in the performance of this contract.

Budget

A maximum budget for the proposed Code Assessment has been set at \$40,000. This amount includes any and all expenses incurred by the selected consultant related to completing this project. A detailed scope of services (broken down by specific milestone events/deliverables) with associated fees is expected to be included in the Code Assessment proposal submission.

Discretion of the City

The City reserves the right to reject any, or all, proposals. All deadlines are for the administrative convenience or needs of the City and may be waived by the City in its discretion.

Proposal Format

The proposal package should be **limited to 25 pages** (not including MWBE forms) and must submitted via email in PDF format and **MUST** include each of the following items:

1. A letter of intent describing the consultant’s interest in this project. This letter must identify a contact person for questions during the review process and provide contact information including telephone number, fax, e-mail, and postal addresses.
2. A scope of work summary as it pertains to the tasks addressed in this document. The summary should elaborate on the process by which each of the tasks will be completed.
3. A proposed schedule for the project, including project milestones. The project schedule shall also provide a detailed chart showing the percentage of total available work time devoted to the project by each key member of the project team.
4. Previous experience and examples of similar reports or plans prepared by the office where the work will be performed, giving the name of the client and brief description of the project, dates work

was completed, special project considerations, etc. Please also include a current client contact with phone number for each project. Limit projects to the last five relevant projects completed by the firm. Do NOT include projects/plans on which members of the applicant firm worked on while employed by another firm.

5. Organizational chart of the project team including any subconsultants to be assigned to the project along with their respective assignments/responsibilities. The list of key individuals should include those who are expected to be significantly involved with the project along with a brief statement as to each individual's expected role(s). The consultant will submit resumes of key individuals outlining their qualifications as it pertains to this proposal. Each resume should include key projects each member has worked on within the past ten years that are similar to the project for which you are proposing.
6. Percentage of the project work to be done in your firm's local office and percentage of subconsulting work anticipated. Provide the total number of employees at your local office. If there is a "corporate" office, provide its location and the total number of employees in the company.
7. A proposed budget showing project costs broken out by task and the total project cost.
8. Provide the amounts of professional liability and general liability insurance carried by the firm.

Evaluation Criteria/Selection Process

The City selects firms to provide professional services based on the demonstrated competence and qualifications provided for a fair and reasonable fee. A detailed scope of services (broken down by specific milestone events/deliverables) with associated fees is expected to be included in this Code Assessment proposal submission.

Evaluation of proposals will be performed by a team consisting of staff from the City-County Planning and Development Services Department and the City Attorney's Office. The proposals will be evaluated on the firm's ability to meet the requirements of this RFP.

Evaluation criteria will include the following, with the score weighting in ():

1. Scope of work and project schedule (30%)
2. Previous relevant experience preparing development ordinances and ordinance assessments (25%)
3. Stakeholder involvement strategy (10%)
4. Value of proposed product in relation to proposal cost (10%)
5. Qualifications and availability of team members and staff assigned to the project (10%)
6. Lead firm is M/WBE or use of M/WBE subconsultant(s) or M/WBE good faith effort (10%)
7. Proximity of Proposer's lead office to Winston-Salem and/or Forsyth County (5%)

Candidate firms may be asked to present their proposal to the evaluation team before the final selection is made.

All questions must be submitted in writing to kirke@cityofws.org by 5:00 pm, September 15, 2017 and will be responded to via addendum.

AFFIDAVIT A

MINORITY PARTICIPATION/GOOD FAITH EFFORTS

Project:

A 10% goal for participation by minority/women owned businesses has been established on this proposal. A proposer may meet this goal through the participation of M/WBE sub-consultants and/or through his own performance on the project if the proposer is a minority/woman owned firm. Please list below all M/WBE firms to be used on this proposal.

Affidavit of _____

(Name of Proposer)

I hereby do certify that this documentation is a true and accurate representation of my MWBE participation and my good faith efforts. (Attach additional sheets if required).

Minority Firm Name City-State	Phone Number	Minority Category*	Type of Work	Percent of Project Work
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

* Minority Categories: Black, African American (B), Hispanic (H), Asian American (AA), American Indian (AI), Female (WF), Socially and Economically Disadvantaged (SE), and Disabled (D).

If the established 10% goal for participation by minority/women owned businesses is not achieved, the proposer must provide, with the proposal, the following documentation to the Owner of his Good Faith Efforts to meet the goals set forth in these provisions.

Examples of documentation include, but are not limited to, the following evidence.

<input type="checkbox"/>	Description	Points	Awarded Points
_____	(a) Did your firm advertise in general circulation, professional association, or minority focus media concerning subcontracting opportunities? NOTE: A consultant must advertise in all three mediums to receive full value for this item).	15	_____
_____	(b) Did your firm provide written notice to a reasonable number of specific M/WBE firms that their interest in the contract is being solicited, at least 10 days before proposals are due to allow M/WBE firms time to participate? Please provide a copy of the solicitations sent to at least 3 minority firms from the source list provided by the owner for each subcontract to be let under this contract (if 3 or more firms are shown on the source list). Each solicitation shall		

include a specific description of the work to be subcontracted, location where the RFP can be reviewed, and name of representative of the lead consultant.

15 _____

GOOD FAITH EFFORTS (continued)

□	Description	Points	Awarded Points
_____	(c) Did you follow up initial solicitation of interest by contacting M/WBE firms to determine with certainty whether the M/WBE firms are interested? Please include telephone log of follow up calls you made to confirm interest.	10	_____
_____	(d) How did your company identify and select portions of the work to be performed by M/WBE firms in order to increase the likelihood of M/WBE participation? Please provide a copy of documentation where this information was included.	15	_____
_____	(e) What services were used from the City of Winston-Salem's M/WBE office; available minority community organizations; minority contractors' groups; local, state, and federal minority business assistance offices; and other organizations that provide assistance in the recruitment and placement of M/WBE firms? Please provide a copy of this documentation. Note: A proposer must utilize at least two agencies to receive full value.	10	_____
_____	(f) Did your company negotiate a joint venture or partnership arrangement with minority firms to increase opportunities for minority participation when possible? Please provide copy of any documentation (could be included in Solicitation Letter) advising M/WBE firms what type assistance was available or outlining any other steps taken to fulfill this requirement.	10	_____
_____	(g) Did your company provide quick pay agreements and policies to enable minority contractors and suppliers to meet cash flow demands? What procedures were initiated to fulfill this requirement and how were the M/WBE firms informed of this assistance? Note: A proposer can receive up to 5 points for offering; 10 points for implementation.	15	_____
Total Points		<u>90</u>	_____

NOTE: A proposer must accumulate at least **55 points** to demonstrate a “**Good Faith Effort**” was made. Partial points may be awarded when the complete requirement of an item is not met.

GOOD FAITH EFFORTS (continued)

Date: _____ Name of Officer: _____

Signature _____

Title _____

State of North Carolina, County of _____ subscribed and sworn before
me this _____ day of _____, 20 _____

Notary Public _____ My commission expires _____

SEAL

AFFIDAVIT B

INTENT TO PERFORM CONTRACT WITH OWN WORK FORCE

County of _____

Affidavit _____
of (Name of Firm)

I hereby certify it is our intent to perform 100% of the work required for the contract:

(Name of Project)

In making this certification, the Proposer states:

- That the proposer does not customarily subcontract elements of this type project,
- Normally performs, has the capability to perform, and will perform all elements of the work on this project with his/her own current work force; and,
- Agrees to provide any additional information or documentation requested by the City of Winston-Salem in support of the above statement.

The undersigned hereby certifies that he or she has read this certification and is authorized to bind the Proposer to the commitments herein contained.

Date: _____

Name of Officer: _____

Signature _____

Title _____

State of North Carolina, County of _____ subscribes and sworn before me

This _____ day of _____, 20__

Notary Public _____ My commission expires _____

SEAL

In the event the Proposer does not self-perform 100% of the work, the contract will be subject to the M/WBE goals originally established for this project, as well as, good faith efforts and documentation requirements of this program.