

# CITY OF MORGANTON NORTH CAROLINA



## REQUEST FOR PROPOSAL for DEVELOPMENT OF A COMPREHENSIVE PLAN

### SECTION A: GENERAL INFORMATION

#### 1. PROJECT

City of Morganton **Comprehensive Plan**

#### 2. ISSUE DATE

Tuesday, January 17, 2023

#### 3. PROPOSAL REQUIREMENTS AND DUE DATE

Respondents must submit a complete response to this RFP, including completion of **all requirements of Section C: Proposal Offer Form**.

**Five (5) originals and a PDF copy** must be received no later than **5:00 P.M. on Monday, February 06, 2023**.

#### 4. DELIVERY INFORMATION

|                          |                        |  |
|--------------------------|------------------------|--|
| Mailing Address:         | Parcel Delivery:       | Email Address:   |
| Wendy Smith              | Wendy Smith            | <a href="mailto:wsmith@morgantonnc.gov">wsmith@morgantonnc.gov</a> |
| Development and Design   | Development and Design |  |
| City of Morganton        | City of Morganton      |  |
| P.O. Box 3448            | 305 East Union Street  |  |
| Morganton, NC 28680-3448 | Suite A-100            |  |
|                          | Morganton, NC 28655    |  |

#### 5. INQUIRIES

Wendy Smith  
Director, Development & Design Services  
City of Morganton  
(828) 438-5270  
[wsmith@morgantonnc.gov](mailto:wsmith@morgantonnc.gov)

## **SECTION B: PROJECT BRIEF**

### **1. PURPOSE**

This Request for Proposal (RFP) seeks professional assistance from qualified persons or firms to develop a comprehensive land development plan.

The City of Morganton is seeking a dynamic planning consultant firm or team to prepare a new comprehensive land development plan (Plan). This comprehensive plan is intended to re-energize Morganton's land planning concepts and initiate community consensus on growth and development policies over the next 15 years. The City seeks to utilize this new Plan as a policy and visual guide for city growth and development throughout the study area. The Plan will examine how the present built environment may, or should be, changed over the next 15 years given the current demographic profiles, economic conditions and community goals. The plan will examine national, regional and local trends that will impact development patterns in the community. It will provide growth implementation strategies and graphically illustrated visions to help guide development decisions over the upcoming 15 years.

The City seeks a professional planning firm that can provide a creative, interactive and dynamic public process intended to build consensus across a broad range of topics affecting the built environment. The plan is intended to promote and provide understanding on Morganton's strengths and weaknesses. A successful plan will involve extensive community engagement to develop a shared vision for the community. The Plan will initiate new or revised public land use policies that will promote long term sustainable growth and development in the community. The successful firm will provide evidence that it has the ability to produce a plan that represents the best of Morganton's past and present and creates an inspiring approach to the future. Morganton's current comprehensive land development plan *Mission 2030* has productively led the City's development for the past 13 years. The updated plan will provide a renewed vision and fresh perspective. The consultant is requested to provide outside perspective and make recommendations as to which directives remain relevant to Morganton's future and which directives should be abandoned.

It is envisioned that this task will be accomplished by examining current trends, policies, needs, public desire, and political direction. The consultant is encouraged to employ a multi-disciplinary team to obtain this information including, but not limited to, analysis of current:

- land use patterns;
- employment trends;
- population demographics;
- transportation initiatives;
- historic preservation and cultural activities;
- recreation and trail planning;
- utility and infrastructure features and policies;
- redevelopment activities;

- residential, commercial and industrial development demands;
- economic analyses;
- open space preservation techniques, urban design approaches and other necessary contributors to the built environment; and
- geographic location and regional position.

The successful team will analyze the above, evaluate the current planning regulations intended to implement the City’s vision, and conduct a program of community engagement to ensure the Plan meets Morganton’s needs into the future. A well-developed strategy for community engagement is essential to the Plan’s development.

The City of Morganton is looking for a qualified professional planning team that can work with the City Council, staff, and an Advisory Committee of local community members to craft an updated vision for Morganton and translating it into a guide for future land use development that is easily understood by all citizens. The document should provide effective and creative strategies to preserve the City’s existing qualities by examining the current issues of today and establishing goals and opportunities into the future.

## **2. CITY OF MORGANTON, NORTH CAROLINA**

Established in 1784, the City of Morganton is branded as “Nature’s Playground” and is situated in the foothills of the Blue Ridge Mountains in western North Carolina, approximately 20 miles west of Hickory and 50 miles east of Asheville along the I-40 corridor. The City covers 19.23 square miles and is the County seat of Burke County. Morganton’s population is approximately 17,500, including an approximately 23% Hispanic population, that adds variety and culture to the local area.

Morganton is the County seat and home to a significant number State facilities, such as Broughton Hospital, North Carolina School for the Deaf, J. Iverson Riddle Development Center, and the second campus of the North Carolina School of Science and Mathematics, as well as Western Piedmont Community College. Historically a home for furniture and textile manufacturing, the city’s economic focus has shifted in recent years, with several international companies, such as Viscotec Automotive Products, Continental Teves, and Molded Fiber Glass, having selected the area as a location for their manufacturing operations.

In the historic downtown area, there are local shops and handcrafted art stores and galleries, several local taprooms and breweries, and CoMMA, the City of Morganton Performing Arts Center, which support residents and visitors to the many local and regional scenic areas. Morganton is home to some spectacular municipal parks including Catawba Meadows Park, the Catawba River Soccer Complex, and the Morganton Greenway System. These local amenities cover more than 300 acres in the city and provide abundant recreational opportunities that are used daily by local residents and visitors from the region. The Morganton Greenway System offers several access points, with parking leading to miles of paved trails along the Catawba River for walking, jogging and biking. Morganton is known for the TGIF Summer Concert Series, a free

outdoor event every summer Friday on the newly renovated Historic Courthouse Square, as well as the Historic Morganton Festival, which just celebrated its 40<sup>th</sup> year.

### **3. BACKGROUND**

The City's current *Mission 2030* Comprehensive Plan was adopted in 2009. Since that time, a tremendous amount of economic, cultural, and environmental change has taken place. Many of the changes reflect national trends; however, unique regional and local conditions also exist. These new trends and existing conditions are reshaping Morganton in ways beyond the guidance offered within *Mission 2030*. For this reason, the City now desires to develop a new foundation document to help guide the anticipated growth and development over the next 15 years.

### **4. SCOPE OF SERVICES**

The selected consultant will work with the City's Development & Design Services Department to develop the comprehensive plan. The consultant's community engagement program will assist in developing an Advisory Committee made up of members of the local community, appointed by the City Council, to work directly with the consultant and staff to provide local insight and recommendations. The selected consultant will be required to:

- (a) Attend a project introduction meeting with City Staff on February 16 or 17, 2023.
- (b) Attend and provide an introductory presentation on the project scope and methodology at a City Council workshop on February 24, 2023.
- (c) Finalize with staff and undertake a detailed community engagement strategy to seek community input into the Plan.
- (d) Assist City staff in identifying membership for an Advisory Committee of local community members to provide local insight throughout the plan development process.
- (e) Attend, prepare materials for, and record and process information gathered from regular Advisory Committee meetings and work sessions over the period of plan development.
- (f) Attend, prepare materials for, and record and process information gathered from minimum of three Community Wide meetings extending over the period of plan development.
- (g) Provide for one working session each with the Planning and Zoning Commission and City Council to seek input on the plan's development.
- (h) Analyze demographic, economic, infrastructure, transportation, and environmental data to recognize historical trends and to project future trends and provide visuals to explain the information and analysis within the plan.
- (i) Analyze existing Land Use Regulations and Policies.
- (j) Evaluate existing land use patterns.
- (k) Analyze appropriate, future types of land use and recommend the location of future land uses.

- (l) Provide a summary of background information utilized to prepare the comprehensive plan document.
- (m) Undertake a thorough analysis of background information gathered against the current *Mission 2030* Comprehensive Plan and provide a written assessment of recommended areas of change.
- (n) Recommend Land Use Goals and Objectives to be achieved over the next 15 years.
- (o) Prepare short and long-term Implementation Strategies to achieve Goals and Objectives.
- (p) Prepare a draft comprehensive plan document, based on the background trend analyses and local input combined with the consultant's planning knowledge to produce best recommendations for future long-range development.
- (q) Provide for one initial comprehensive review of the draft document by City staff and make revisions as required.
- (r) Present the revised draft comprehensive plan at separate meetings of the Planning and Zoning Commission and City Council.
- (s) Prepare a final comprehensive plan document, incorporating any required changes as a result of City staff, Planning and Zoning Commission and/or City Council comments.
- (t) Prepare a final summary brochure describing the comprehensive plan process and outcomes/recommendations.
- (u) Attend and provide minutes of a minimum of monthly project update meetings with City staff.

## **5. DELIVERABLES**

### **A. ELECTRONIC DOCUMENTATION**

- Copies of all reference data and preliminary study documents.
- Power point presentation of the new plan for promotional purposes.
- Summary brochure to be utilized for promotional purposes.
- Print ready copy of the draft and final plans in both MS Word and Adobe PDF.
- Electronic maps provided in ArcGIS format.
- Copies of all meeting presentation materials and meeting minutes.

### **B. WRITTEN DOCUMENTATION**

- Ten (10) printed copies of final plan.
- One hundred (100) printed copies of letter-size summary brochure.

### **C. MEETINGS/PRESENTATIONS**

- One project meeting with City staff.
- Minimum of monthly project update meetings with City staff.
- Presentation of project scope and methodology at City Council Workshop on February 24, 2023.
- Minimum of three (3) Community Wide meetings.

- Minimum of three (3) meetings with the Advisory Committee.
- Presentation to Advisory Committee of final plan.
- Workshop with the Planning and Zoning Commission.
- Presentation to Planning and Zoning Commission of final plan.
- Presentation to City Council of final plan.
- Other meetings as informed by the consultant’s proposed community engagement strategy.

## 6. EVALUATION CRITERIA

The City will use the following criteria to evaluate the proposals:

- Qualifications and relevant experience of Respondent providing the services,
- Specific plan or methodology proposed to be used to perform the services, and
- Fee for providing the services.

## 7. PROJECT TIMETABLE

| Activity   | Date                               |
|--|------------------------------------|
| <b>RFP Process</b>   |                                    |
| RFP Released   | January 17, 2023                   |
| RFP Closed   | 5:00pm Monday,<br>February 6, 2023 |
| Proposals reviewed   | February 7 to 10, 2023             |
| Interviews with consulting firms                             | February 13 and 14, 2023           |
| Announcement of successful Respondent                        | February 15, 2023                  |
| Project commencement meeting with City staff                 | February 16 or 17, 2023            |
| Presentation on project methodology to City Council Workshop | February 24, 2023                  |
| Contract formally awarded by City Council.                   | March 6, 2023                      |

A successful consultant will be selected by February 15, 2023 and will begin coordination with City staff in preparation for the first formal kickoff meeting to this comprehensive plan development process for the community at the Morganton City Council Retreat on Saturday, February 24, 2023. However, the formal contract will be awarded at the March 6, 2023 City Council meeting.

## **SECTION C: PROPOSAL OFFER FORM**

### **1. SPECIFIC PROPOSAL REQUIREMENTS**

Proposals should be as thorough and detailed as possible so that the City may properly evaluate your capabilities to provide the required services. Each proposal shall fully address all areas in this Proposal Offer Form and may provide an accompanying written narrative to best express their capabilities.

### **2. RESPONDENT'S CONTACT DETAILS**

|   |  |
|---|--|
| Name of Legal entity:<br>[Note: if not a company,<br>insert name of individual] |  |
| Trading Name:   |  |
| Registered Office/<br>Business Address:   |  |
| Mailing Address:  |  |
| Contact Person:   |  |
| Office Telephone:   |  |
| Mobile Telephone:   |  |
| Email Address:  |  |

### **3. RESPONDENT'S INFORMATION**

- A. Please provide a brief history of the Respondent, including description of primary business.
- B. How many years of experience has the Respondent had in the type of service required to be provided under this contract?
- C. Please describe the Respondent's experience in providing the services required under the Scope of Services detailed for this project.
- D. Please list any trade or professional associations of which the Respondent is a member.
- E. List any proposed sub-contractors and provide contact information for each, or state that all work will be undertaken in house. If sub-contractors are proposed to be used, please address questions A-D above for each sub-contractor.

**4. METHODOLOGY**

- A. Please provide a detailed outline of the proposed approach and methodology to develop the comprehensive plan, including a detailed community engagement strategy, to achieve the requirements as outlined under Scope of Service and Project Deliverables.
- B. Provide a detailed proposed timeline for each step of the project, including community engagement activities.
- C. Describe how the proposed methodology and engagement strategy suits this project and provides a point of difference for the Respondent.
- D. Please provide explanations of the use of this type of methodology on other projects.
- E. What do you consider to be the key issues with management of the process of comprehensive plan development?

**5. RESPONDENT’S CAPACITY**

- A. Please state the resources that will be allocated to the performance of the Contract, including equipment and all personnel.
- B. Will any sub-contractors be engaged by the Respondent in performing this contract? YES / NO If YES, provide details:
- C. List the qualifications, skills and experience, and proposed contribution to the project of all individuals the Respondent intends to engage in providing the service, including sub-contractors. Please also attach resumes of all individuals the Respondent intends to engage in providing the service.

| <b>Team Member</b> | <b>Qualifications</b> | <b>Skills and Experience</b> | <b>Contribution to the Project</b> |
|--------------------|-----------------------|------------------------------|------------------------------------|
|                    |                       |                              |                                    |
|                    |                       |                              |                                    |
|                    |                       |                              |                                    |
|                    |                       |                              |                                    |
|                    |                       |                              |                                    |
|                    |                       |                              |                                    |
|                    |                       |                              |                                    |
|                    |                       |                              |                                    |



## 6. PRICE

| <b>Lump Sum Total</b> | <b>Amount</b> |
|-----------------------|---------------|
|                       | \$            |

The lump sum total shall include all worked hours and disbursements to complete the item, including but not limited to, travel costs, printing, photocopying, and postage.

While a lump sum total price is required, we also request individual pricing for the items noted below.

| <b>Item</b> | <b>Description</b>   | <b>Amount</b> |
|-------------|--|---------------|
| 1           | Each Additional Advisory Committee or City Council meeting (including all estimated preparation/printing/travel costs) | \$            |
| 2           | Printing/photocopying costs for final documents  | \$            |
| 3           | Total project travel disbursements   | \$            |

The Total Price payable by the City of Morganton is not subject to rise and fall in the costs of labor, materials, or any other items.

## 7. HOURLY RATES

Hourly rates for all personnel, including sub-contractors, must be provided.

The rates will be used as a guide to hours allocated to roles and will be utilized if any additional work outside the original scope is ordered.

| <b>Person</b> | <b>Hourly Rate</b> | <b>Number of Hours on Project</b> |
|---------------|--------------------|-----------------------------------|
|               | \$                 |                                   |
|               | \$                 |                                   |
|               | \$                 |                                   |
|               | \$                 |                                   |
|               | \$                 |                                   |
|               | \$                 |                                   |
|               | \$                 |                                   |
|               | \$                 |                                   |

## **8. RELEVANT EXPERIENCE AND REFERENCES**

The Respondent shall submit details describing its previous relevant experience and achievements in performing similar or comparable work, together with names of clients or authorities for which work was undertaken, including telephone numbers of contact persons and the date when such work was carried out. Examples of similar plans produced may also be provided. Please complete an additional identical table for all proposed sub-contractors.

**Description of contract:**

**Location of contract:**

**For whom contract performed:**

**Contact details of client:**

**Indicative value of work:**

**Commencement date:**

**Completion date:**

**Description of contract:**

**Location of contract:**

**For whom contract performed:**

**Contact details of client:**

**Indicative value of work:**

**Commencement date:**

**Completion date:**

**Description of contract:**

**Location of contract:**

**For whom contract performed:**

**Contact details of client:**

**Indicative value of work:**

**Commencement date:**

**Completion date:**

**Note:** The City of Morganton will treat the contact persons set out above as the Respondent's references and may contact any or all of the nominated personnel or any other relevant person representing the nominated organization. Any information provided by the references will be treated as having been given as commercial in confidence.

**9. CONFLICT OF INTEREST**

If the Respondent has a conflict of interest (or any potential for a conflict of interest) concerning this Request for Proposal, please provide details of that conflict or potential conflict. If no conflict of interest or potential for a conflict of interest exists, please write “Not Applicable”.

**10. ADDITIONAL INFORMATION**

Please insert or attach any additional information the Respondent considers is required to enable evaluation against the evaluation criteria.

**11. DECLARATION**

By signing the below, I Certify that I have carefully read and fully understand the information contained in this RFP, and that I have the capability to successfully undertake and complete the responsibilities and obligations of the Proposal being submitted and have the authority to sign Proposal on behalf of my organization.

**SIGNED by or on behalf of the Respondent**

**Signature** .....  
**Name** .....  
**Company** .....  
**Title** .....  
**Date** .....

## **SECTION D: PROPOSAL CONDITIONS**

### **1. INTERPRETATION AND DEFINITIONS**

- A. **Due Date** means the date specified in Section A: General Information.
- B. **Proposal Offer** means your completed Section C Proposal Offer Form and any accompanying documents you submit for the City of Morganton's consideration.

### **2. QUESTIONS**

- A. After the proposal issue date, all communications between the City and prospective Respondents regarding this RFP shall be in writing. If you have any questions about this Request for Proposal, you must lodge a written enquiry by email to [wsmith@morgantonnc.gov](mailto:wsmith@morgantonnc.gov) no less than five (5) business days before the Due Date, by 5:00PM on Monday, January 30, 2023. The City of Morganton may not respond to any questions raised during the five (5) business days before the Due Date. Responses to any questions raised in the required time period will be provided no later than two (2) business days before the Due Date.
- B. Questions and responses affecting the scope of the services will be provided to Respondents by issuance of an Addendum which will be posted to the City's website at <https://www.morgantonnc.gov/>. This information will also be emailed to all firms who have submitted their intent to bid and contact information.

### **3. NO DISCLOSURE**

- A. Under no circumstances should you disclose the contents of your Proposal Offer with any other party that is submitting a Proposal Offer.
- B. If you disclose or discuss your Proposal Offer with any other potential Respondent, your Proposal Offer may be disqualified at the City of Morganton's discretion.

### **4. PROPOSAL OFFER SUBMISSION**

- A. You must complete the Proposal Offer and submit the Proposal Offer and supporting material to the City of Morganton by the Closing Date in the manner specified in Section A: General Information.

The Respondent is not limited to providing the information addressed directly by the questions listed in Section C: Proposal Offer Form. The Respondent should submit any relevant documents or information with the response to the Proposal Offer Form.

- B. The Proposal Offer (once completed and submitted pursuant to these Proposal Conditions) constitutes an offer by you which may be accepted by the City of Morganton.

- C. Your Proposal Offer shall be open for acceptance by the City of Morganton for 45 days after the Closing Date.

## **5. ADDITIONAL INFORMATION**

- A. The City of Morganton may require that you submit additional information concerning your Proposal Offer, which may include further financial information, or information to verify the contents of your Proposal Offer.
- B. If you do not submit such additional information within the time the City of Morganton requires, the City of Morganton may refuse to consider your Proposal Offer.

## **6. EVALUATION**

- A. The City of Morganton will take into account the criteria in Section B: Project Brief in evaluating the Proposal Offer.

Please keep in mind that cost, while an important factor, will not be a sole determining factor. Unusually low bids that are obviously out of line with other bidders without justification will raise concern. The lowest bid will not automatically be awarded preferential consideration.

- B. Failure to respond to any requirements outlined in the RFP, or failure to enclose copies of the required documents, may disqualify the bid.
- C. The City of Morganton is not obliged to accept any Proposal Offer. The City of Morganton reserves the right to reject any or all proposals, waive technicalities, and to be the sole judge of suitability of the services for its intended use and further specifically reserves the right to make the award in the best interest of the City.
- D. In evaluating and selecting a Respondent, the City of Morganton will abide by its Procurement Policy and all relevant local government legislation.

## **7. ACCEPTANCE**

If your Proposal Offer is accepted by the City of Morganton, you will be notified in writing and the City of Morganton will forward a Contract to you.

## **8. COSTS**

The City of Morganton will not refund any costs incurred by you in making a Proposal Offer. Even if the City of Morganton terminates this Request for Proposal at any time, the City of Morganton will not be responsible for any costs that you have incurred.