

REQUEST FOR QUALIFICATIONS&PROPOSALS

Comprehensive Plan Update

For the Town of
Marshall, North Carolina



Date Issued: December 1, 2008

Submittal Due: January 22, 2009
A Project For: Town of Marshall, NC
PO Box 548
Marshall NC 28753

Steered by: Town of Marshall Planning Board

Response and Inquires to: Zoning Administrator
Martha Banks, AICP
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(828) 649 3961
(828) 649 3031

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Reference Exhibits

Reference Exhibits and the contents of this RFQ/RFP may be found at the following webpage: <http://www.townofmarshall.org>

Part One –The Project

1. Overview

The Town of Marshall, NC (herein after referred to as *the Town*) seeks the services of a qualified consultant or consultant team who will be responsible for providing specific professional services that result in a comprehensive plan update (hereinafter referred to as *The Plan*). The selected consultant will have considerable ability in the following areas: citizen involvement/participation; sustainable town/rural development; planning and design skills; North Carolina state and local government regulations; and implementation strategies including funding alternatives.

The Plan will be a concise and forthright assessment of the potential and liabilities of Marshall's built environment in the near future. Any proposed strategies shall be holistic in nature, e.g. they will take into account possible social, economic, cultural and environmental impacts to the citizens of the town while also taking into account the sustainability of the Town's administrative structure.

The Plan will include: a recognition (via synthesis) of past planning work pertaining to Marshall, an assessment of Marshall's current built environment; community driven principles for future development; prioritized policy recommendations supporting Marshall's envisioned future; and implementation strategies.

This plan is intended to support near-future efforts to update the Town's development ordinances and policies. Current community goals need to be synthesized with previous planning efforts, and the ability for citizens and developers to easily understand the vision of the document is imperative. The plan should be detailed enough to address Marshall's immediate needs and dynamic enough to serve as a guide for the future. The successful respondents to this RFQ&RFP will demonstrate an innovative approach to town planning.

Funding:

Current FY 2008-2009 budget includes \$16,000 of dedicated funding for the Comprehensive Plan Update. It is the intention of the town to consider funding this and subsequent planning processes for the following two fiscal years ('09-'10 and '10 -'11) however no additional funding guarantees are made by the Town. We encourage submitters to consider innovative or outside funding opportunities for this and subsequent Town projects.

2. Project Purpose

The current adopted land use plan for the Town of Marshall was produced in 1970. In the almost forty years since the plan was conceived, real change has

occurred in areas like occupational choices, water quality (and quantity), recreational opportunities, building codes, and best practices in zoning. Like many places in Western North Carolina, the last five to ten years has brought development types and sizes not seen in Marshall for many years. With this development also came a population growth rate that was not projected. Marshall now needs a fresh development document that guides 5-15 years of sustainable growth.

A unifying belief in the town is that Marshall is an amazing place to be. Residents and visitors are enamored with our beautiful mountain town centered along the French Broad River. We want to keep it that way.

3. Study Area Characteristics and Background

Marshall contains 3.5 square miles of land. The population in 2000 was reported at 851 people. Mapping for the town of Marshall (via an ArcIMS website) can be found online at

<http://www.landofskygis.org/MadisonIMS/>.



The map layers, specifically but not limited to parcel data, are not accurate nor complete; however they provide a very good overview to the town's geographic features. Civic websites such as <http://marshallnc.blogspot.com> and <http://madisoncountyarts.com/mcac/index.cfm> are a good place to explore Marshall's other characteristics.

The focus of the project will be the Town of Marshall's municipal jurisdiction. Gateways, corridors, and peripheral areas should inform the plan. Several annexed but non-contiguous properties (that receive Town services) should also inform the plan.

The three main sub areas of the Town of Marshall are:

Downtown

Much of the historic downtown is experiencing a renovation of existing building stock. While some infill on vacant lots is possible, new

development (and much rehabilitation) is constrained by floodplain regulations, as the downtown sits on the banks of the French Broad River. Steep cliffs and rocky hillsides rise hundreds of feet from Main Street, further complicating a compact development pattern. Marshall's downtown contains an eclectic mix of retail shops, professional services, government uses, artists' studios, recreation areas, restaurants and people. It is a place where people gather to celebrate, whether for one of the community's regular festivals and events, or just to have a cup of coffee and talk shop with one's neighbor.

Residential Neighborhoods

Surrounding the downtown is a largely residential area experiencing a variety of development pressures. Few large (over 15) parcels remain; those that do are perceived by many as targets for speculative development. Affordable housing is needed by the residents. Conflict exists over issues such as the extension of infrastructure, desirability of mobile homes, lack of flexibility in subdivision standards, appropriateness of density, and buffering between commercial uses.

Periphery

The northern limit of the town is ringed by "the bypass" – a corridor of auto oriented commercial buildings built on lots that mostly fall out of the town's zoning jurisdiction. The western and southern limits are characterized by their agricultural and historically rural/woodland uses. The eastern limit includes all of the abovementioned development types, and also industrial and business park areas. It is likely that the edges of the town contain the highest possibility for change.

3. Related Studies and Programs Existing, Currently Underway or Proposed

There are a many existing plans, studies and programs that need to be considered as a piece of the Plan. These include but are not limited to:

- Handmade in America's *Small Town Revitalization Project Report and Community Assessment*;
- The *Sewer and Water Capital Improvement Plan* recently submitted to the NC Rural Center;
- The *NCSTEP Strategy Economic Development Plan French Broad River Basinwide Water Quality Plan*;
- *The Economic Development Feasibility Study for Marshall NC 2003*; and the
- *Floods on the French Broad River vicinity of Marshall NC Report*

As mentioned at the bottom of the Table of Contents, links for many of these documents may be found on the Town of Marshall's website under the Comprehensive Plan Update section; when new documents or links are added it will be noted by a change in the update date on the page.

4. Objectives/Desired Planning Outcomes

To a citizen, elected official or potential developer, The Plan should
(This is not in priority order):

1. Provide a comprehensive plan for future development and land use.
2. Contain principles that foster sustainable economic growth. Consideration must be given to current commuting patterns and occupational and economic trends to promote future opportunities for business development in the town itself.
3. Promote sustainable development measures that can incorporate green, aesthetically-pleasing design standards and land-use combinations. Incorporation of policies and initiatives from Smart Growth Initiative, Center for New Urbanism, USGBC LEED-Neighborhood Design, and other best-practices -including your own innovative approach- is encouraged.
4. Overview/evaluation of public infrastructure (buildings, parks, public amenities, street network, streetscapes, water, sewer, telecom, stormwater, trash collection/recycling, etc.) to determine if additional public infrastructure is needed to support new or expanded development.
5. Strengthen the relationship of the towns sub areas to each other via attention to corridor, gateway, and periphery recommendations.
6. Provide recommendations on the current and future transportation network.
7. Prepare a sound base for future development ordinances that will provide a flexible and clear development process resulting in high quality development.
8. Provide implementation strategies that can be used by staff, volunteers, and the Administration to insure that development results in the desired physical form and responds to social needs, for example affordable/workforce housing and open space.
9. Coordinate with all relevant plans and initiatives in process that affect the town of Marshall.
10. When possible, provide policy recommendations that help realize and promote a healthy mix of land uses.

11. Use existing commissions/committees as a vehicle for informing the public and interested stakeholders about the plan and getting them involved in the planning process and implementation phase.

The Plan shall contain the following elements:

- Citizen involvement
- Community vision
- Land use plan
- Transportation network plan
- Discussion on how economic development, housing, open spaces, scenic and historic areas, natural resources, public facilities and services and quality design fit into the Plan
- Prioritized implementation recommendations, with suggested strategy alternatives and responsible parties where appropriate.

To address the above elements, it is envisioned that the final scope of work will include:

- Background research, data collection and mapping: the staff of the Town of Marshall and the Town of Marshall Planning Board shall assist.
- Community input- 1 public meeting, 1 community drop in session and a 30 day public comment period
- Overall market and land use summary
- Historic Downtown specific market and land use summary
- Consideration of demographic and development trends
- Capital improvement review
- Implementation plan and timeline
- Acknowledgement of compatibility with and relation to other projects and plans affecting the town
- Establishing a sound basis for a new regulating plan/ordinances

6. Consultant Responsibilities

- Review existing plans, assessments and current revitalization efforts and evaluate appropriateness and applicability.
- Work with the Town of Marshall and the Town's Planning Board throughout the project to refine the work program and maintain a shared vision for the project
- Organize meetings with key stakeholders and the community to obtain ideas, suggestions, and refine the vision for the town.

- Prepare conceptual development plans and graphics for the study area, and more specific development plans and graphics for demonstration nodes in the three sub areas.
- Develop a matrix to show future development components, associated costs and the responsibilities of different agencies for implementation of the plan.

7. Town Responsibilities

(The Town Board of Alderman, Zoning Enforcement Officer, and Town Planning Board)

- Provide meeting locations, and assist in scheduling meetings.
- Provide all relevant documents, reports, list of property owners, businesses, and contact names if known



Part Two - The Selection Process

8. Selection Process Overview

This process begins with receipt of statements of qualification/proposals as a response to the RFQ&P outlined herein. Following review of the submissions, a short-list of consultant teams will be created and ranked by the Marshall Planning Board (see next section).

Town staff will initiate an interview and negotiations (e.g. regarding scope of work and fee) with the top ranked consultant team. If the Town and the top ranked consultant fail to create an agreement or memorandum of understanding, the Town will initiate negotiations with the next highest ranked

9. Plan Advisory Committee/Marshall Planning Board role

A Plan Advisory Committee will be established to review proposals, recommend finalists to Town Council, and work with the selected team on the Plan. The individuals serving on this committee will consist of Town staff and members of the Planning Board

10. Terms and Conditions of the RFQ

- A selection committee approved by the Town will screen the submissions. It is expected that after the issuance of this RFP&Q there will be no communication with parties other than those specifically noted herein and such communication will be exclusively for clarification regarding procedures and objectives. The Town prohibits submitters from communication with any board member, employee, or elected official during the submission and selection process.
- Communication with any parties for any purposes other than those expressly described herein may cause an individual firm, or team to be disqualified immediately from participating in the development solicitation. It is extremely important all potential respondents are given clear and consistent Information; therefore, all respondents are required to submit any questions related to this project or selection process in writing so answers can be distributed to all registered respondents. Questions about the interpretation of specifications or the RFQ process should be directed in

writing to [Martha Banks](mailto:martrg@hotmail.com), Town Zoning Administrator at martrg@hotmail.com . Questions must be received in ample time before the period set for the receipt of submittals. No inquiries, if received within ten (10) days of the deadline date set for receipt of submittals will be given any consideration. Any and all interpretations/answers to questions will be available to prospective proposers in the form of an addendum to the specifications which, if issued, will be available no later than five (5) days prior to the date set for receipt of qualifications submissions.

We strongly encourage those parties wishing to submit qualifications to register with :

Martha Banks, Town Zoning Administrator

At martrg@hotmail.com

or by calling Martha Banks at (828) 649 3961.

It is the responsibility of all parties planning to submit qualifications to contact the The Town Zoning Administrator prior to submitting qualifications to ascertain if any addenda have been issued, to obtain all such addenda, and to return executed addenda with the proposal.

- The Town of Marshall encourages participation by minority businesses in the award of contracts. Participants are hereby notified that respondents can access North Carolina state certified minority firms for subcontracting purposes online at

<http://www.ips.state.nc.us/ips/vendor/srchven.asp>.

It is the policy of the Town to (1) provide minorities an equal opportunity to participate in all aspects of its contracting and procurement programs and (2) prohibit any and all discrimination against persons or businesses in pursuit of these opportunities.

- The Town of Marshall reserves the right to accept or reject any or all submittals, with or without cause, all decisions related to this solicitation by the Selection Committee and the Town Board of Alderman will be final. The Town reserves the right to request clarification of information submitted and to request additional information of one or more respondents. Costs for preparing the submittal in response to this request are solely the responsibility of the respondent.
- The Town of Marshall reserves the right to schedule interviews with any and all shortlisted submitters.

It will be necessary for responding parties to comply fully with the general terms and conditions outlined in this document if they are to be considered. A letter attesting the respondent has read and understands all procedures is a part of the submission requirements (Use Attachment A).

11. Response/Submittal Requirements

Each applicant must demonstrate in their submittal that they have the professional capabilities and the organizational and administrative experience needed to accomplish this project. The town of Marshall encourages emerging planners and planning firms to apply; if your experience does not fit the requirements outlined below but you are able to demonstrate the necessary skills and expertise to execute this proposed project in a quality manner the town will consider your submittal.

The Respondents submittal shall contain no more than ten (double sided) pages and shall contain specific responses to the following:

a. Statement of Understanding

A statement describing the applicant's understanding of the objectives defined for the proposed Plan in terms of the study area proposed, and the special skills and innovative thinking that the team possesses to address the study area.

b. Specific Project Experience

Provide information on similar or relevant projects, which the applicant has executed. Note: please identify projects completed within budget and schedule.

c. Proposed Project Team Members

Submit a written description of the applicant's organizational composition, disciplines and the primary role of each firm or individual if using a team (include an organization chart if submitting as a team). The information must clearly indicate the applicant's designated team leader for this project and the responsible party in each firm who will be providing the required professional experience.

d. Individual Experience

Provide a description of the background of the applicant and or team (key members) and their specific participation in previous projects that would directly relate to this project. This may be done in descriptive text or in a shortform (one page or less) resume. Include any certifications or licensures. If submitting as a team, indicate whether team members have previously worked together.

e. List of References

Provide a minimum of 3 client references with which the applicant has provided similar planning/design services within the last four years. Reference shall include name and telephone number of the contact person. The applicant may include additional references from earlier work if the applicant feels it is pertinent

and better defines the team's capacity. Each listed reference shall include a description of the services provided to client and specific role (lead or sub).

f. Project Approach

Describe the applicant's approach and understanding of the project, specifically addressing the tasks outlined in this RFQ&P. Indicate the estimated hours to be spent on each task with a brief supporting explanation. Also acknowledge your response to the proposed timeline for this plan update in your response.

Your submittal should acknowledge that Marshall is unique place and that your interest in developing this plan update includes a desire to work in this specific unique place. We aren't aware of any other teeny historic downtowns in Western North Carolina that are bisected by the French Broad River, where you can be visiting the farmers market after taking a modern dance class on an island in that river, and where indigenous rock walls and hundred year old root cellars still exist on Main Street.

g. Additional Information

Provide other information you feel is relevant to indicate the applicant's abilities to successfully complete a project of this nature.

12. Selection Criteria

Consultant proposals will be evaluated using the following criteria as a measure of the applicant's ability to successfully complete the project scope of work.

Relevant experience of the consultant team with similar efforts, and in technical areas required to successfully complete identified plan elements. Experience with past projects utilizing interdisciplinary skills related to rural/village/town design, land use planning and analysis. Demonstration that problems were solved using a unique process and solution that benefited the client and achieved a higher quality of planning and design. (25 points)

Understanding of project goals in the context of local study area; demonstration of innovative approaches and solutions that address Marshall's issues. (30 points)

Qualifications and previous related work of key personnel and or subcontractors; particularly experience with municipalities of similar size, government structure, complexity and issues. (15 points)

The demonstrated ability of key personnel and or subcontractors to organize and lead effective, productive public meetings and in-house project meetings. (15 points)

Willingness to work with/meet the proposed timeline for completing the plan and the phasing of deliverables. (10 points)

Quality of sample materials and qualifications package submitted. (5 points)

13. Anticipated Schedule of Events/Timeline

December 1, 2008- release of RFQ&P

January 22, 2009 at 4:00 pm EST -deadline for submittals to be received

January 29-February 11, 2009 – selection interviews performed with consultant(s) if necessary

February 12, 2009 – submittal review and selection meeting for the Advisory Panel/Selection Panel

February 16, 2009 – presentation of recommendation/selected firm to Town of Marshall Board of Alderman

March 2009 – special meeting by Town of Marshall Board Alderman to approve contract with selected firm

April 2009 – scope of work begins

Early July 2009 – Progress report to Town of Marshall Board of Alderman

August- September 2009 – scope of work completed.

Late September 2009 – presentation to Town of Marshall Board of Alderman for consideration of adoption

14. Final Deliverables

The following is a list of projected deliverables for the final product of the Plan. This list is subject to change and will be finalized with the consultant team as part of the final contract.

Ten hardbound copies of the Plan and one unbound copy of the Plan.

A digital copy in PDF

The Plan should be submitted in booklet form using standard size sheets including selected text, photographs, graphics, tables, charts, and renderings to facilitate client reproduction.

All deliverables should be compatible with Windows operating systems, Microsoft Office, ArcMap and other formats as determined during the project work program.

All deliverables should be presented to the Town of Marshall in both hard copy and electronic formats whenever possible.

Rights to all data, work products, etc. revert to the Town of Marshall upon completion of contract.

Professional assistance and progress reports initiated at the start of the project extending through the adoption of the Plan by the Town Council.

The Plan accessibility in its entirety via the Internet.

15. Submission Procedures

- **Submittals must be received by the Town of Marshall's Zoning Administrator no later than 4:00 pm EST on January 22, 2009.**

In order to be considered a valid submittal, each must meet the following requirements:

Each must be signed by an officer of your company who can be held accountable for all representations (see Attachment A)

The Town will review the proposals and may schedule interviews for finalists (see Anticipated Schedule of Events)

Submitters are prohibited from contacting any representatives of the Town regarding this proposal. Except for under the circumstances outlined in this RFQ&P (see Terms and Conditions) Eight (8) copies of the application/submittal package as well as one complete copy of the submittal in portable document format (PDF) on a compact disk must be submitted no later than the above-mentioned deadline. (The PDF file should include all maps, plats, renditions, photographs, or other graphics or materials that were included in the bound copies.).

Submittals should be mailed or delivered to the attention of:

Ms. Martha Banks, Town of Marshall Zoning Administrator
PO Box 548
Marshall NC 28753
Or walk in to Marshall Town Hall at
45 N. Main Street

Contact for Information

Please direct any questions or comments on this RFQ&P to:

Ms. Martha Banks, AICP/Town of Marshall Zoning Administrator
PO Box 548
Marshall NC 28753
Or walk in to Marshall Town Hall at
45 N. Main Street
Phone (828) 649-3961
E-mail martrg@hotmail.com

Attachment A:
Understanding of RFQ&P Procedures, Terms and Conditions
(To be returned with submission)
Invitation to Submit
Town of Marshall, NC
RFQ # P&Z-1

I acknowledge I have read and understand all procedures and requirements of the above referenced RFQ&P and have complied fully with the general terms and conditions outlined in the RFQ&P

Development Team: _____
Representative's Signature: _____
Representative's Printed Name: _____
Date: _____