



Request for Proposals (RFP)
Charlotte Historic District Policy & Design Guidelines Update Project
Charlotte-Mecklenburg Planning Department

1. INTRODUCTION

The Charlotte-Mecklenburg Planning Department invites firms to submit their proposals and work examples for consulting services to update the Charlotte Historic District Policy & Design Guidelines (Guidelines). The goal of the project is to create a user friendly document that is rich in content and illustrations.

The Guidelines were previously amended in 2011. Today, with the potential addition of new historic districts, expansion of existing districts and new development practices, amendments to the Guidelines are needed. The proposed amendments include document reorganization, updated and expanded content, and the inclusion of consistently designed illustrations. Staff will assist the consultant in each phase and lead certain components when appropriate. A copy of the Guidelines is available online: <http://hdc.charlotteplanning.org>

2. PROJECT SCOPE

Component 1. Planning and Content Development

At a minimum, the consultant will be required to:

1. Analyze the existing document and develop an outline of the reorganized and updated document.
2. Reorganize the guideline content by placing the existing text into the new outline. This will require the use of a system to track all changes to the guidelines. Content changes include the addition of data charts and tables.
3. Make changes to format and content. This will also require tracking of changes. Prepare summary of recommendations for future improvements including identification of absent content, content to be eliminated, revision of standards and improved processes.
4. Review the changes with Planning Department staff, indicating any conflicts or issues with the text, in light of staff and stakeholder feedback, and revise as needed.

Component 2. Community Engagement

At a minimum, the consultant will be required to:

1. Meet with stakeholders and staff to gather feedback on the current document and listen to stakeholder ideas about what could be done to enhance the policy document.
2. Work with stakeholders and staff to develop and refine recommendations for amendments.
3. Give presentations to stakeholders, including presentations on recommended changes to the document.

Component 3. Plan Document Development

At a minimum, the consultant will be required to:

1. Provide documents to staff in Microsoft Word, InDesign or other formats as requested. Include hyperlinks to cross-references and other information as directed by staff.
2. Meet with staff to discuss the types of illustrations and photographs needed.
3. Produce high resolution digital format for each illustration. Illustrations are to be delivered to staff, organized by chapter and labeled with description and relevant page number.
4. Work with technical staff to upload the digital format online and provide staff with detailed instructions for maintenance.
5. Produce drafts and the final document for viewing on the HDC website.

3. SUBMISSION GUIDELINES

Format and Content

The submittal format should follow the suggested content outline below. The submittal document should be of sufficient detail to effectively present the Consultant's proposal and responses to the items requested. There is no specified length. However, proposals *will not be judged by the volume of material, and therefore should be as concise as possible without sacrificing clarity.*

The content should include the following information, as previously requested or described in this RFP, in the following order:

1. Cover Letter, briefly introducing the Consultant and any proposed sub-contractors, if applicable.
2. Proposed Work Program, indicating the approach and steps that the consultant recommends to complete the work, and a timeline for key project steps.
3. Anticipated additional deliverables (optional) should be listed and briefly described.
4. Estimated Costs and Fees.
5. Consultant Qualifications should address experience in historic district document development. The Consultant should provide the following:

- a. A brief explanation of why the applicant believes the consulting team is best able to complete the project – including a description of any unique qualities, expertise, or experience the firm and individuals would bring to the project.
 - b. A brief summary of the consultant’s relevant experience.
 - c. Assurance that the consultant or team can complete the project within the time frame, with a description of other commitments the firm will have during this period.
 - d. Names, qualifications, and résumés of individuals who will be directly involved in this project. Resumes should not exceed two pages in length.
 - e. Three references with key contacts and phone numbers.
6. 2-3 Work Product Examples showcasing recent relevant projects, along with key contacts and phone numbers, and a very brief description of each project.
 7. Consultants must submit 4 bound original proposals, including all required forms, and a CD containing one consolidated digital copy of the complete proposal in pdf format using software such as Adobe. Proposals should generally be printed on 8 ½” x 11” paper, but pages with organizational charts, matrices, or diagrams may be printed on larger sheets. Document pages should be numbered. Type size should be no smaller than 11 points for narrative sections, but may be reduced for captions, footnotes, etc. as required while still maintaining legibility.

Non-conforming submissions may be removed from consideration. All submissions should consist of materials that are easily recyclable or reusable at the conclusion of the evaluation process. Proposals must be submitted to the Charlotte-Mecklenburg Planning Department by **5:00 pm on Friday, August 21, 2015**. No submittal items can be accepted after the deadline. No fax copies will be accepted at any time.

Deliver or send proposals to:

John G. Howard, Historic Districts Commission Administrator
Charlotte-Mecklenburg Planning Department
600 E. Fourth Street, 8th Floor
Charlotte, NC 28202
Email: jghoward@charlottenc.gov
Telephone: 704-336-5994

4. FEES AND EXPENSES

The City has allocated up to \$50,000 for this project with proposed completion within 12 months.

The Consultant shall submit estimated costs and a proposed fee statement, including a spreadsheet indicating the basis for the costs for each component of the scope of services. Provide the dollar value of the work of the Consultant and all sub-consultants, including the percentage of sub-consultants involvement in each phase. Provide an hourly rate schedule by personnel, reimbursable expenses, and the proposed number of hours budgeted for each member of the Consultant firm/team.

Proposed fees will be used as an indication of the level of services to be provided. The City will not select professional services on a low bid basis, although the cost of work will be one of the factors considered in selecting a consultant. The City reserves the right to negotiate final fees and scope of services with the selected Consultant, potentially including the final composition of the Consultant team.

5. SELECTION PROCESS AND SCHEDULE

A staff Selection Team will review all proposals submitted by the above deadline. Please do not attempt to contact any members of the Selection Team. Any attempt to do so may result in disqualification of the firm's submittal for consideration. All questions regarding the project or the submittal should be directed in writing to the Historic District Commission Administrator by **Friday, August 7, 2015:**

John G. Howard, Historic Districts Commission Administrator
Charlotte-Mecklenburg Planning Department
Email: jghoward@charlottenc.gov

The Selection Team will review all submittals to identify those best meeting the criteria below and, in general, best suited to meet the goals of the project. This review will be completed September 4, 2015 and applicant firms may be contacted for clarification of their proposal.

The Selection Team intends to choose a limited number of applicant firms for further consideration and to interview these firms during the period of September 14 - 25, 2015. Notification of these firms will be made as soon as possible, but the consultant team should be prepared to convene in Charlotte for these interviews.

A finalist will be selected for contract negotiation, and if that negotiation is successful and appropriate authorities approve the contract, the selected firm will be announced by October 23, 2015. If no agreement can be reached with the top ranked firm, staff shall proceed to negotiate with the next ranked firm, until both parties arrive at a satisfactory agreement.

Proposals will be evaluated based on each of the following general criteria:

- **Demonstrated Capacity** (Past performance of consultant firm on similar projects, as well as project manager and other team members; availability of consultant team members; extent of other completed projects of similar scope and magnitude).
- **Proposed Work Program and Deliverables** (Understanding of the assignment; quality of response to proposed work program and deliverables).
- **Communications** (Organization/completeness of response; writing skills, as shown through the submission and any submitted work samples).
- **References** (Confirmation that consultant has performed similar work in past; assessment of ability to produce quality product within the project schedule; assessment of ability to conduct productive meetings; assessment of ability to work with staff, stakeholders, and elected officials).
- **Work Product Examples** (Quality, appearance, presentation, and applicability of submitted work examples).

6. RFP SCHEDULE OF EVENTS

Steps	Date
Request for Proposal distributed	July 23, 2015
Deadline for questions	August 7, 2015
Closing date for submissions	August 21, 2015
Selection completion	September 4, 2015
Consultant interviews	September 14 - 25, 2015
Selection of Consultant	September 30, 2015
Contract signed	October 23, 2015
Project commencement	November 2015

7. PROJECT SCHEDULE-Subject to Change

Planning (November - December)

1. Analysis of Policy and Design Guidelines
 - Provide recommendations for document improvement
2. Historic District Commission
 - Introductory meeting and overview of project schedule
 - Draft a community outreach plan and meeting schedule

Community Outreach (December - April)

1. Public Workshop #1
 - Input and visioning with residents and other stakeholders
2. Public Workshop #2
 - Analysis from workshop #1 and recommendations
3. Public Workshop #3
 - Refinement of recommendations

Plan Development (April-July)

1. First draft
 - Prepare document text and graphics/examples for review by staff
2. Second draft
 - Deliver draft to staff
 - Present overview of draft to stakeholders and post online
 - Receive comments on draft electronically
3. Public meeting
 - Review draft with stakeholders, present online comments and receive additional comments at the public meeting
4. Final draft
 - Format final draft including all materials, drawings, photos, tables, and electronic and hard copy
5. Prepare final document