



**CHARLOTTE-MECKLENBURG
PLANNING COMMISSION**

REQUEST FOR QUALIFICATIONS

**PROFESSIONAL CONSULTING
SERVICES FOR:**

**ZONING ORDINANCE
RESRUCTURING AND REFORMATTING**

ISSUED: September 23, 2008

DUE: October 24, 2008

DELIVER TO: Sandra Montgomery
Planning Coordinator
Charlotte-Mecklenburg Planning Department
Government Center
600 E. Fourth Street – 8th floor
Charlotte, NC 28202

Request for Qualifications for Restructuring of the City of Charlotte Zoning Ordinance

OVERVIEW

Intent

The Charlotte-Mecklenburg Planning Department invites firms to submit their qualifications to provide:

Professional consulting services to produce a reorganized and recodified Zoning Ordinance that is structured for readability and ease of accessing information, both in hard copy and in a digital version. This effort will not change the existing content, standards or regulations.

BACKGROUND

The City of Charlotte's zoning ordinance includes traditional or conventional zoning provisions that date back as far as the 1950's, as well as performance criteria. The ordinance has evolved over time, with urban design standards and a variety of new zoning districts added. These include districts for mixed-use and transit oriented development, as well as pedestrian overlay districts and historic overlay districts.

The last major overhaul of the ordinance was begun in the late 1980's and ended with adoption in 1992. Over the subsequent years, the zoning ordinance has been amended numerous times to resolve conflicts, add new provisions, add flexibility, and ensure consistency with North Carolina statutes.

The multiple changes to the ordinance have made it difficult to find information and hard to read, both for external and internal customers. In addition, the digital version is cumbersome to navigate and lacks links needed to move quickly from one section to another.

PROJECT DESCRIPTION

This project will be split into two distinct phases. The first phase will be an assessment of how best to reorganize and recodify the current zoning ordinance. The second phase will result in reorganization and recodification of the zoning ordinance, utilizing existing code standards. This phase will also include creation of a digital version of the ordinance with hyperlinks between sections to allow users to easily navigate through the ordinance, and other improvements related to readability and ease of accessing information.

Detailed Project Description

Phase 1 – Assessment of Zoning Ordinance Organization/Format

At a minimum, the consultant will be required to:

1. Meet with internal and external stakeholders to gather feedback on the current structure of the ordinance and make suggestions about how to improve organization and format of the existing ordinance, etc.
2. Produce an assessment of the City's current zoning ordinance organization and formatting based on input from internal and external stakeholders, as well as the consultant's analysis.
3. Develop alternative outlines/concepts for reorganization and reformatting of the ordinance, including the pros and cons of each.
4. Work with staff to develop a recommended organizational and formatting structure for the ordinance.
5. Present the new structure to both internal and external stakeholders and gather feedback.
6. Finalize and provide a digital recommendation for reorganizing and reformatting the ordinance based on Planning staff feedback.

Phase 2 - Reorganization of Ordinance and Adoption of Reorganized Ordinance

At a minimum, the consultant will be required to:

1. Reorganize the existing zoning ordinance text, placing the existing text into the new ordinance outline. This will require use of a system to track all changes to the ordinance.
2. Make changes to language and format based on the recommendations developed in Phase 1. This will also require tracking of changes.
3. Review the changes with Planning Department staff, indicating any conflicts or issues with the text. After meeting with staff, revise as needed.
4. Present the draft of the restructured ordinance to both internal and external stakeholders and gather feedback.
5. Based on discussions with Planning staff, finalize the draft ordinance.
6. Produce a digital version of the ordinance that includes hyperlinks between sections to make the ordinance more user-friendly, and searchable.
7. Make presentations, as needed, to the Planning Commission, Economic Development and Planning Committee, City Council, etc. These presentations will show how the document has changed, reaffirming that no regulatory changes have occurred.

PROJECT SCHEDULE

Phase I is expected to begin in January, 2009 and be completed by May, 2009.

Phase II is expected to begin in June, 2009 and be completed (including a 4-month adoption process) by January, 2010.

GUIDELINES FOR SUBMISSIONS

Submittal Format and Content

The submittal format should follow the suggested content outline below. The submittal document should be in 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 RFQ, in the following order:

1. **Cover Letter**, briefly introducing the consulting firm and sub-contractors, if applicable.
2. **Proposed Work Program**, indicating the approach and steps that the consultant recommends to accomplish Phase I and Phase II and a timeline for key project steps.
3. **Anticipated Deliverables** should be listed and briefly described.
4. **Consultant Qualifications** should address experience in zoning ordinance development. The Consultant should provide the following:
 - a. A brief explanation of why the submitter 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 lead firm will have during this period;
 - d. Names, qualifications and résumés of individuals who will be directly involved in this project; and
 - e. References with key contacts and phone numbers.
5. **Work Samples** should be attached, and should emphasize recent, relevant projects. The name and a very brief description of such projects should be given.

Submission Requirement

Applicant consultant firms must provide ten (10) copies and one (1) original copy of the submittal to the Charlotte-Mecklenburg Planning Department by 4:00 pm on October 24, 2008. No submittal items can be accepted after the deadline. No fax copies can be accepted at any time.

The required documents should be submitted to the Assistant Project Manager.

Assistant Project Manager Contact Information:

Sandra Montgomery
Charlotte-Mecklenburg Planning Department
600 East Fourth Street, 8th Floor
Charlotte, NC 28202

Telephone: 704-336-5722
Fax: 704-336-5964
E-mail: smontgomery@ci.charlotte.nc.us

SELECTION PROCESS AND SCHEDULE

Consultant Selection Process

A staff Review Team will review the consultant submittals. Please do not attempt to contact any members of the Review Team. **Any attempt to do so will result in disqualification of the firm's submittal for consideration.** All questions should be directed to the Assistant Project Manager.

The staff Review 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 occur during the period of October 27, 2008 to October 31, 2008 and applicant firms may be contacted during this period for clarification of submitted RFQ.

The Staff Review Team intends to select a limited number of applicant firms for further consideration and to interview these applicant firms during the period of November 10, 2008 to November 14, 2008. Notification of these firms will be made as soon as possible, but the consultant team should be prepared to convene 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 November 21, 2008. 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.

Questions regarding this process must be submitted in writing to the Assistant Project Manager, (see contact information above).

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

- *Demonstrated Capacity* (Past performance of consultant firm, 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 time frame of scope; assessment of ability to run effective public meetings; assessment of ability to work with staff, stakeholders and elected officials)
- *Work Samples* (Quality and applicability of submitted work samples)

Selection Schedule (*subject to change*)

Date	Steps
9-23-08	Request for Qualifications distributed
10-24-08	Closing date for submissions
10-27-08 to 10-31-08	Staff Team reviews submissions
11-10-08 to 11-14-08	Finalist teams are interviewed
11-17-08 to 11-21-08	Selection of Consultant occurs
11-21-08 to 12-31-08	Contract signed.

GENERAL TERMS AND CONDITIONS

This Request for Proposals does not commit the City of Charlotte (*hereinafter “City”*) to enter into an agreement, to pay any cost incurred in the preparation of the response to this request or in subsequent exclusive negotiations, or procure or contract for the project.

Withdrawal of Submissions: A proposer may withdraw the RFQ at any time prior to the closing time and date by notifying the Project Manager in writing.

Reservation of Rights: The acceptance of an RFQ does not constitute an agreement that any contract will actually be made. The City reserves the right to:

- reject any or all Requests for Qualifications;
- reissue a Request for Qualifications;
- extend the time frame for submission by notification of all parties who have registered an interest in this RFQ with the designated contact person;
- request more information from any or all applicants;
- decline to accept all terms of any RFQ, reaching agreement on final terms during contract negotiations;
- terminate negotiations for failure to reach mutually acceptable terms.

Proposal as Public Record: The confidentiality of the applicant’s RFQ will be maintained until the time and date established for the initial submission of all RFQ’s. Thereafter, each proposal will not be considered confidential and the contents of the RFQ will be considered the public record of the governing body. However, North Carolina General Statutes Sections 132-1.2 and 66-152 provide a method for protecting some documents from public disclosure. If the Consulting firm follows the procedures prescribed by those statutes and designates a document “confidential” or “trade secret”, the City will withhold the document from public disclosure to the extent that is entitled or required to do so by applicable law, and will return the document after selection.

Proposer Incurred Costs and Proposal Ownership: Each proposer will be responsible for all costs incurred in preparing a response to this Request for Qualifications. The selected consultant will be responsible for all costs it incurs during negotiations. All materials and documents submitted by the proposer in response to the RFQ will become property of the City and will not be returned (with the exception of work samples, which may be retrieved from the Planning Department office within thirty days after the closing date).