



REQUEST FOR QUALIFICATIONS

for an

UPDATE TO THE CITY OF STATESVILLE UNIFIED DEVELOPMENT CODE

DATE ISSUED

February 26, 2024

QUESTIONS AND CLARIFICATIONS DUE DATE

March 11, 2024

DUE DATE

March 25, 2024, by 4:00 pm, email Marked "UDC UPDATE"

Flash Drive Delivery see Physical location below

SUBMISSIONS

Mailing Address

City of Statesville
ATTN: Sherry Ashley,
Planning Director
227 S. Center Street
Statesville, NC 28687

Physical Location

(For Flash Drive Delivery Only)

City of Statesville City Hall
ATTN: Sherry Ashley,
Planning Director
227 S. Center Street
Statesville, NC 28677

E-Mail

sashley@statesvillenc.net

Request for Qualifications
Updates to the Unified Development Code

The City of Statesville invites qualified, professional firm(s) or organization(s) who can assist the city in its efforts to update, modernize and codify the City of Statesville Unified Development Code (UDC). The city originally had a zoning and subdivision ordinance until the first Unified Development Code was adopted in 2010.

Further, the city seeks to identify qualified consultants who have extensive experience in creating/updating UDCs, strong knowledge of North Carolina General Statutes (NCGS) and new development trends, good facilitation skills and experience with public meetings and outreach, quality graphic design abilities, and efficient project time management.

All respondents to this Request for Qualifications (RFQ) are subject to the instructions communicated in this document and are cautioned to review the RFQ in its entirety and follow instructions carefully.

This RFQ includes the following sections:

- A. UDC Background
- B. Scope of Services
- C. Content and Format of Qualification Package
- D. Selection Process
- E. Evaluation Criteria

SECTION A UDC Background

The City of Statesville lies at the northern edge of the Charlotte metropolitan area. Located within Iredell County, Statesville has population of approximately 28,000 residents.

Statesville's greatest assets include its location at the intersection of I-77 and I-40, access to the greater Charlotte metro, Piedmont Triad, and Hickory/eastern foothills regions, numerous US/NC access routes and abundance of water and sewer capacity. The city serves as home base for residents and visitors seeking to explore Lake Norman, the Yadkin Valley wine region, and the foothills of the Appalachian Mountains. Statesville truly is "where it all comes together."

Over the past decade, the city has seen significant residential and industrial growth. From 2010-2020, the community has added over 4,000 new residents (+16%) and 4,641 dwellings, many at the edge of our growth area. The city has also seen increased industrial growth, with the addition of millions of square feet of new industrial/warehousing space. This peripheral residential growth and rapid expansion of industrial buildings have all created challenges for the community that we hope the updated UDC will address.

The city has updated the 2010 UDC to comply with the revised 160D legislation. In addition, the city has also adopted an updated transportation plan in 2019 and an updated Land Development Plan in 2022. However, the city is experiencing significant growth in development and population. Therefore, the project will result in a comprehensively updated UDC.

As part of the update, the following documents should be referenced in updating the UDC:

- Current Unified Development Code
- 2045 Land Development Plan
- Unified Development Code Analysis
- Real Estate Market Analysis Report
- Development and Land Use Profile
- 2019 Mobility + Development Plan
- Downtown & NC 115 Streetscape/Master Plan
- Route to Recreation Plan
- 2023-2028 Statesville Strategic Plan

These documents are available on the City's website at <https://www.statesvillenc.net>

SECTION B Scope of Services

The City of Statesville UDC update should include the following information and analysis. Alternative services and deliverables may be proposed on evidence of the need to meet the purpose of the RFQ. RFQs that do not include all tasks will not be considered. Please note that the final deliverables listed in the tasks below are not expected to be produced at the time of RFQ response submittal but are included for reference.

Task 1: Timeline

- Provide an estimated timeline and work schedule preferably in phases.
- Demonstrate how the submitting firm will manage its responsibilities and work scheduled to be performed, including work with City staff.
- **Final Deliverable:** Timeline with identified actions, deadlines, and groups involved.

Task 2: Analysis of Existing UDC

- Conduct a detailed review and diagnostic examination of the current UDC, including stakeholder interviews, and review and incorporate goals of adopted plans (referenced in UDC Background). The following items may be included for assessment; however, this is not an exhaustive list.
 - Compliance with state and federal statutes and case law, including but not limited to, sign regulations, stormwater regulations, floodplain regulations, etc.
 - Consistency within the UDC and consistency between other regulatory documents and departments, examining areas of redundancy or conflict
 - Continuity, accessibility, and streamlining for example regarding readability, structure, formatting, presentation of information, and language/vocabulary
 - Distinctions and purposes of current zoning districts
 - Enforceability, for example regarding violations and penalties, clarity of standards, uses, processes, words, and definitions
 - Equity, for example regarding how standards may impact diverse groups disproportionately
 - Analysis of how UDC promotes/undermines housing variety types, affect cost of new housing
 - Develop an incentive program to promote the development of affordable housing units (i.e., density bonus, fee in lieu/land banking)
 - Analysis of 2045 Land Development Plan recommendations
 - Analysis of staff recommendations
 - Use and/or lack of best practices and consideration of new planning trends
- The analysis should identify areas of weakness and gaps and provide recommendations for improvement.
- Prepare a framework that logically organizes the contents of development regulations, including existing and proposed categories.

- **Final Deliverable:** Detailed diagnostic report of the current UDC outlining weaknesses and gaps and corresponding recommendations for improvement along with a framework to update the UDC.

Task 3: Review Comprehensive Plans

- Review the City documents listed in the UDC Background section of this RFQ.
- Identify the goals and recommendations from these documents and how they are transferrable into regulations or achievable via incentives.
- **Final Deliverable:** Report summarizing applicable comprehensive plan recommendations, where they fit into the UDC, and how they can be implemented.

Task 4: Stakeholder Feedback

- Community and other stakeholder input should be sought throughout the project. While listed in this scope of services as a single task, it is envisioned that engagement will occur in an iterative manner throughout the project.
- Develop a stakeholder engagement plan that uses a variety of methods and includes residents, property owners, businesses, the development community, and community organizations. The strategies utilized should take into consideration the range of interests and backgrounds. The engagement plan may include a stakeholder committee.
- Include timeline and number of meetings.
- Include City staff from various departments within the engagement processes.
- Engage and receive feedback from the City Council, Planning Board, and other advisory boards, as necessary.
- The consultant is responsible for developing agenda items, presentations, engagement materials, and minutes.
- **Final Deliverables:** Engagement plan along with presentations, surveys, timeline, and other engagement strategies and materials utilized to fulfill the engagement plan.

Task 5: Updated UDC

- The updated UDC shall be prepared in phases for staff review, with the definitions section updated in each phase.
- Provide bi-weekly updates.
- Provide monthly updates on city website.
- Include relevant references to Statesville plans and documents.
- Prepare a new zoning map that corresponds with any new zoning districts if applicable.
- Prepare draft of full UDC document with updated text, tables, diagrams, images, and formatting.
- Attend and Facilitate Public Hearings and meetings with stakeholders, residents, Planning Board and City Council.
- **Final Deliverable:** Final draft of updated UDC that is ready for publication and use along with up to 2 additional meetings/revisions to final draft.
- **All electronic files to be provided to the City of Statesville.**

Budget

The City is operating on an appropriated budget for this project. The budget is to include any and all expenses incurred by the elected consultant related to completing this project. A detailed scope of services (broken down by specific timeline, tasks, and deliverables) with associated fees is expected to be included with the proposal submission.

Acceptance/Rejection of Proposals

The City reserves the right to accept and/or reject any or all statements of proposal submitted, in whole or in part. The City reserves the right to negotiate any and all elements of the proposal by and with any consultants it deems suitable to carry out this project. The city has no obligation to award work based off this RFP.

Historically Underutilized Businesses

Pursuant to General Statute 143-148 and Executive Order #150, the City of Statesville invites and encourages participation in the procurement process by businesses owned by minorities, women, disabled, business enterprises and non-profit work centers for the blind and severely disabled.

SECTION C

Content and Format of Qualification Package

The submission, excluding work samples, shall be a maximum of 30 pages. Only electronic files will be accepted for consideration; no paper copies shall be submitted. Files must be submitted via email and followed up with a flash drive. Submittals shall include the following:

Letter of Interest

The letter of interest provided in the submission shall include the following:

- The name and address of the prime consultant and the state in which it is incorporated and chiefly located.
- The name and address of each sub-consultant and the state in which each entity is incorporated and chiefly located if sub-consultant is part of team.
- A brief description of the proposer (prime and sub-consultants, if applicable), and their interest in performing the required professional services.
- The name, address, phone, and e-mail address of the designated contact for the proposer (prime consultant).
- A statement indicating any judgments against the proposer (prime, sub-consultants, and third-party consultants) within the last five (5) years, or pending litigation, related to professional conduct or services.
- Disclosure of any conflicts of interest for 18 months prior to the submission of the RFQ response package to the city. All addenda to the RFQ document (each addendum must be identified), if applicable. Signature of a duly authorized official of the consultant firm or other person fully authorized to act on behalf of the firm or team.

Firm and Staff Qualifications

The submission shall include a general description of the firm and its background as it relates to this project. Specific information regarding the firm and staff shall be submitted and include:

- Information regarding the firm's previous experience with at least 2 similar or related projects, performed within the last 5 years, including a brief description of these projects and project staffing.
- Information demonstrating the firm and staff capabilities to perform all aspects of this project.
- Information regarding the expertise and experience of staff person(s) assigned to work on the project. It should also contain specific proposed responsibilities of the project staff person(s).
- A description and organizational chart showing the structure of the proposer's team, interrelationships, areas of responsibility and the names and current professional licenses of key personnel assigned to the project along with their areas of responsibility. Note: no substitutions to the proposed project team of the selected firm(s) can be made without the prior written approval of the City.
- Information on the current and projected workload of key staff to be assigned to this project, including level and magnitude of involvement.
- Three references including client name, address, contact person, telephone number, email, project start and end date as well as a project description. References should be for similar or related projects on which key staff that are proposed for this project have worked.
- The firm and staff qualification information for each sub-consultant, a description of the services the firm performed, as well as related projects and references, if sub-consultant is part of team.

Project Approach

The submission shall include a response to each task in the Scope of Services (SECTION B) and identify how the requirements will be met. Each response will also include, but is not limited to, a detailed statement of how the submitting firm intends to approach the work required.

Anticipated Schedule

The submission shall include an anticipated schedule with the timeframe for each task incorporated. The submission shall demonstrate how the submitting firm will manage its responsibilities and work scheduled to be performed, including work of and with City personnel.

SECTION D

Selection Process

Firm selection will be based on the content, completeness, and presentation of information contained within the submittal package, consisting of the letter of interest, firm and staff qualifications and relevant experience, project approach, anticipated schedule, and work samples related to preparing UDOs for comparable jurisdictions as detailed in the Evaluation Criteria section of this RFQ.

The City of Statesville reserves the right to reject any responses to this RFQ that do not comply with the content and format of proposal requirements. The city can also conduct discussions with any or all respondents. The City accepts no financial responsibility for any costs or expenses incurred by any entity in responding to this RFQ. All submissions may be kept by the City and may be disclosed to third parties at the City's discretion.

SECTION F Evaluation Criteria

- 1. Qualifications of the Firm:** Outline and specify the qualifications of the firm to provide the requested services as outlined in the scope of work. This shall include any sub-consultants that may be part of the team, if applicable. Provide references. (20%)
- 2. Overall Qualifications of the Project Manager and Project Team:** Clear identification of the project manager and team personnel that will be assigned to the project, including the structure and capacity of the team. This section shall include the demonstrated project management and quality control methods employed by the team. (20%)
- 3. Project Approach and Project Understanding:** Preference shall be afforded to those firms that, in the opinion of the selection committee, will be able to adequately respond to requests for consultation meetings or project administration requirements, firms having a detailed understanding of the project scope and requirements, and firms proposing a reasonable and achievable timeline. (35%)
- 4. Relevant Experience.** Demonstrate relevant experience with UDO and code development in comparable communities. Provide relevant work samples. (25%)

QUESTIONS

Questions concerning this RFP may be submitted until 4:00 PM, Friday, March 11, 2024, to Sherry Ashley, Planning Director by email at sashley@statesvillenc.net

Electronic RFP's must be submitted to sashley@statesvillenc.net by 4pm on March 25, 2024, marked "UDC UPDATE". Flash drives are to be delivered to 227 S. Center Street, Statesville, NC 28677, Planning Department.