



**CHATHAM COUNTY
REQUEST FOR PROPOSAL
UNIFIED DEVELOPMENT ORDINANCE**

ISSUE DATE: JANUARY 31ST 2019

DUE DATE: FEBRUARY 28TH 2019

MAILING ADDRESS:

Chatham County Finance Department
P.O. Box 608
Pittsboro, NC 27312

Project Overview

Introduction

The Chatham County Finance Department on behalf of Planning Department is requesting proposals from planning firms with experience in evaluating, researching, merging, and writing land use regulations to develop a Unified Development Ordinance (UDO) for the County.

This would require a merge, rewrite, and update of multiple ordinances and regulations while evaluating and improving upon existing standards by incorporating additional documents provided. The UDO should be clear, flexible, predictable, consistent, and user friendly. Additionally, the purpose of creating a Unified Development Ordinance is to align development regulations with the vision of the Comprehensive Plan, *Plan Chatham*, in an effort to implement its goals.

Background: Community in Brief

Chatham County is located in the center of the State of North Carolina, nestled between both the Triad and Triangle Regions. The County consists of approximately 707 square miles and estimated population of 70,928 (US Census 2015). In light of recent growth and approved large development projects; the County's population is expected to double by the year 2040.

Chatham County boasts a unique landscape; home to the Haw, Rocky, Cape Fear, and Deep Rivers, Jordan Lake State Recreation Area, vast farmland and forestry, 4 distinct municipalities, two certified industrial mega sites, as well as a variety of unincorporated, dispersed communities.

Until August of 2016, only half of the County was zoned requiring the need for several different land use regulations to guide land development. Since August of 2016, pre-existing, non-conforming businesses are being offered the opportunity to rezone to a suitable zoning classification.

Recently adopted in November 2017, the County adopted its first comprehensive plan, *Plan Chatham*, and Future Land Use Map. It was designed to be forward thinking not only laying the groundwork of the Community's vision of Chatham, but also detailing recommendations for the UDO moving forward.

Existing Plans and Regulations

Current ordinances are not only numerous (reflective of the County previously being partially zoned), but are also outdated and cumbersome to navigate. Some regulations use contradictory language in tandem with others. There is a lack of graphics, illustrations, and clear definitions. There are insufficient cross-references, and outdated standards and design guidelines, and vague language. The County wishes to modernize its land development regulations, address major issues and content in moving toward a UDO that combines all land use and development regulations and ordinances into a single document.

Reference Documents

The following list is a source of hyperlinked documents that will be closely evaluated during this process:

Ordinances and Regulations

- [*Zoning Ordinance*](#)
- [*Junkyard Ordinance*](#)
- [*Watershed Protection Ordinance*](#)
[*Watershed Protection Map*](#)
- [*Compact Communities Ordinance*](#)
- [*Subdivision Regulations*](#)
 - [*Guidelines for Conservation Space Selection*](#)
- [*Mobile Home Ordinance*](#)
[*Table of Contents*](#)
- [*Off-Premise Signs Ordinance*](#)
- [*Wireless Telecommunication Facilities Ordinance*](#)
- [*Stormwater Management Ordinance*](#)
- [*Soil Erosion and Sedimentation Control*](#)
- [*Hazardous Waste Management Ordinance*](#)
[*Table of Contents*](#)
- [*Impact Fee Ordinance*](#)
- [*Moratorium Procedures Ordinance*](#)
- [*Flood Damage Prevention Ordinance*](#)
 - [*Table of Contents*](#)
- [*Chatham County Fire Prevention and Protection Ordinance*](#)

Plans & Guidelines

- [*Chatham County-Town of Cary Joint Land Use Plan*](#)
[*Joint Land Use Plan Map*](#)
[*Joint Land Use Plan Interlocal Agreement*](#)
[*Joint Land Use Plan Interpretation #1*](#)
[*Joint Land Use Plan Interpretation #2*](#)
- [*Chatham County Comprehensive Plan \(Plan Chatham\)*](#)
[*Conservation Design Guide*](#)
- [*Chatham County Appearance Commission Design Guidelines*](#)
- [*Inventory of the Natural Areas and Wildlife Habitats of Chatham County, North Carolina \(June, 1992\)*](#)
- [*Chatham Conservation Partnership Conservation Plan*](#)

Rules & Procedures

- [*Planning Board Code of Ethics*](#)
- [*Planning Board Rules of Procedure*](#)
- [*Ordinance Establishing the Planning Board*](#)
- [*Conditional Use Hearings Rules of Procedure*](#)

Scope of Services

Funding Source

This project will primarily be funded with county funds, however, there is the possibility of federal funds being utilized later during the project. All contractors and approved subcontractors must comply with all applicable federal laws, regulations, executive orders and conditions of the identified funding source. The contract will be awarded as a fixed-price or not to exceed.

Project Goals

The following goals are anticipated to be accomplished:

- Draft and adopt a Unified Development Ordinance with commonly accepted modern planning practices and contemporary zoning tools; compliant with North Carolina state statutes.
- Create clear procedures and guidelines that are simple, flexible, and easily administered by staff; a user friendly document for residents, elected officials, appointed boards, and the development community.
- Create a streamlined and clearly outlined development review process tailored uniquely to Chatham County. All the while, incorporate innovative and creative approaches to land-use regulation, building upon the best design principles and practices throughout the United States and NC laws/codes.
- Integrate and cross reference other land use regulations, to ensure consistency with local, state, and federal laws and regulations.
- Incorporate the recommendations of the County's Comprehensive Plan. The UDO should encourage development and redevelopment of designated centers, support sound economic development, support preservation of agricultural areas, integrate multimodal transportation where it is appropriate, and provide a platform to support sustainable infrastructure investment and affordable housing.
- Build an illustrated code: depiction of requirements, concepts, process flowcharts, etc.
- Coordinate with other entities, including but not limited to: adjacent counties, regional partners, Army Corps of Engineers, North Carolina Natural Resource Wildlife Commission, North Carolina Department of Transportation, and municipalities to ensure consistency in land use patterns at boundaries as needed.

Expectations of Consultant

The selected consultant will be expected to serve in the following capacities and complete certain tasks, including but not limited to:

- Allow for County staff input and for an interactive writing process; work with core and technical staff review teams, allowing sufficient time for distribution and detailed review.
- Provide regular updates on the project's progress to the County project manager through a method that is mutually acceptable to both county staff and selected consultant; such as the creation of an organized tracking system between consultant and staff project manager to reflect feedback and record changes over time.
- Develop a strategic engagement strategy/schedule to include feedback from recommending bodies, topic specific feedback group, and stakeholders as needed throughout the process.
- Serve as a facilitator to recommending boards, providing neutral opinions and resolutions, including but not limited to Board of Commissioner meetings, Planning Board meetings, and Environmental Review Advisory Committee Meetings, Agriculture Board Meetings.

- Serve as a mediator between county staff and feedback groups at stakeholder meetings with a clear goal to reach realistic and functional compromise from Development Community, Agriculture Advisory Board, Chatham Conservation Partnership, Affordable Housing Advisory Committee, North Carolina Natural Resource and Wildlife Commission, Agribusiness Council, etc. This may also include creating questions for and providing agenda materials and discussion points to assist in facilitation of other feedback groups.
- Provide visuals including, but not limited to, graphs, charts, graphics, illustrations, examples, decision matrices etc. to format and structure a more user friendly and intuitive UDO.
- Explore and provide evaluation of different approaches and recommendations to land use regulations such as:
 - *Evaluate the applicability and effectiveness of the creation of agriculture districts;*
 - *Create agriculture friendly subdivision guidelines;*
 - *Provide mechanism for facilitating home-based rural business activities and flexibility for rural businesses such as performance based standards in Agricultural and Rural areas;*
 - *Consider utility policies and plans in regard to land development;*
 - *Evaluate viable options for open space requirements including “in lieu of fees”, requirements, or incentives for locating adjacent to or in proximity to existing or planned parks and trails;*
 - *Consider hydrology & geology in relation to development’s water resource impacts as well as storm water management; appearance guidelines for major thoroughfares, office, industrial, mixed use, and commercial sites;*
 - *Evaluate aquifer recharge in relation to different surrounding land uses i.e. mining, agriculture, residential, etc.;*
 - *Consider creation of guidelines for mobile home park redevelopment;*
 - *Consider the effects that proposed regulatory changes will have on financial, natural and infrastructure resiliency of the county including climate change impacts;*
 - *Evaluate options for tree preservation for new developments;*
 - *Evaluate and consider requirements and/or incentives for conservation subdivisions in conservation areas, agriculturally friendly subdivisions in agricultural areas, water reuse systems, reservation of easements for recreational, agriculture, and conservation uses, as well as options for affordable housing provision;*
 - *Create a set of mixed use zoning districts to facilitate development in appropriate locations;*
 - *Consider guidelines to encourage positive impacts to health; incorporate a health in all policies approach (HiAP) in considering the effects of new regulations;*
 - *Identify and remove or revise regulatory barriers that may have negative impacts i.e. barriers to healthcare system, barriers to renewable energies, etc.;*
- Provide guidance and outline an adoption process regarding implementation of any zoning map and district changes including how to manage Legacy Districts that would result from converting to the UDO. Work with County’s GIS Department in preparing necessary updates to GIS files in the latest Arc Map format.
- Provide a summary recommendation of additional staffing needs that may result from added complexity of implementing new regulations and departmental procedures. (i.e. number of staff, technical specialty, programs needed, on call needs, etc.)
- Allow for scenario testing in drafting process to ensure regulations are effective, appropriate, and account for practical problems and/or other inadvertent impacts that may arise.

- Include staff training/orientation, including recommendation of the best approach for managing and maintaining the new UDO including guidance on the initial rezoning of new districts and materials for initial public education.
- Using review by an attorney approved by County staff to ensure compliance with all applicable State of NC Statutes.
- Work effectively, timely, economically and in a professional manner, to fulfill the objectives and scope of the work within the appropriated budget of \$400,000 no longer than estimated 4 years.

Expected Deliverables

The main deliverable of this project is an effective UDO. However, during the process, the product should include, but not be limited to the following deliverables:

- **Audit report** of existing ordinances to identify improvements and changes that are needed/recommended.
 - *This includes, but is not limited to, recommended changes to: zoning ordinance standards, districts, definitions, illustrations, table of uses, design guidelines, processes, etc.*
- Draft an **annotated outline** in regard to the audit report. Additionally, Incorporate recommendations of the comprehensive plan as well as a strategy for implementation of changes.
- Conduct **conference calls** (*i.e. Go To meetings or other interactive platform*) regularly as needed with project manager and County staff.
- Attend approximately 20-25 **in person meetings** for recommending boards as needed (*Board of Commissioners, Planning Board, Environmental Review Advisory Committee, Agriculture Advisory Board, and Chatham County Appearance Commission*) as well as estimated 6 meetings for stakeholder groups (*two to three groups each consisting of members from the local Home Builders Association, Economic Development Board, Board of Health, Grand Trees of Chatham, Climate Change Committee, Affordable Housing Committee, etc.*). Outline their involvement in the engagement strategy schedule.
- Provide **materials/presentations** as needed to facilitate topic specific feedback group meetings outlined in the engagement strategy/schedule.
- **Notes** and dissemination of information: Structure an **organized tracking system** to reflect feedback and record changes over time.
- **Draft UDO:** all compiled data generated over the course of the project, and final documents in a file format that the County has the ability to take ownership of and edit. As well as a final presentation highlighting major changes in land use regulations through process and instruction on use of the document
- **Final UDO:** all sections of the ordinance, including any graphic files (*i.e. illustrations, graphics, flowcharts, matrices, etc.*), are to be provided in the appropriate digital format and file size. UDO should be delivered in a Microsoft Word editable format and a PDF version that is word searchable and able to be hosted on county website. 32 hard copies, one digital copy, and an internet-ready copy of all components of the final document.
- **Administrative Manual** outlining the development review processes including flowcharts for administrative review procedures and approval processes.
- Provide initial guidance and materials for **public education workshops**.

Scope of Work

The consultant will be charged with completing the Chatham County Unified Development Ordinance. A staff project manager will be assigned by the County to serve as the primary point of contact for the consultant. The overall scope of work shall include, but is not limited to the following key components:

Project Orientation

At the start of the process, the consultant will meet with County staff representatives and project manager as a means of understanding the scope of the overall project and groups involved. The consultant will present a predicted schedule and suggested phasing of the project, adjusting if necessary from feedback collected at the meeting. The consultant will be responsible for reviewing and understanding the comprehensive plan, other identified County regulations, plans, and policies, as well as all relevant and applicable local, state, and federal laws.

Issues Identification

The consultant will review the existing land use regulations and gather input from the core and technical staff review teams concerning current ordinance requirements, legislative and administrative procedures, land development regulations deficiencies, suggested changes, and implementation procedures, table of uses etc. The consultant will also help identify what decision items or input, if any, should be collected from recommending boards and feedback groups at this time.

Annotated Audit Report

The consultant will complete an audit of the current land use regulations. With the items noted in the issue identification process in mind, the audit should be made with consideration to applicable federal, state, and local laws, and trending or innovative techniques/concepts and strategies/approaches. The consultant will provide a summary of consistencies or inconsistencies between the current ordinances and the County's Comprehensive Plan and other County plans and policies to determine the appropriate regulatory framework for implementation. Sections of the existing ordinances that are not in need of rewriting should also be identified. The consultant will prepare a draft and final report of the ordinances audit to present to the Planning Board, Environmental Review Committee, and Board of Commissioners.

Draft Outline

The consultant will identify and discuss new concepts and approaches for potential inclusion in the draft ordinance, with special attention to addressing the objectives. After input from recommending boards and feedback groups on these decision making points, the consultant will prepare an annotated outline that includes a section-by-section detailed description of the proposed new UDO, and overview of its proposed structure and substance, a discussion of options, and a commentary explaining the rationale for the recommended approach to drafting the UDO. The consultant will provide the County with the draft annotated outline for County review and comment. After obtaining general agreement on the decision points and contents of the draft annotated outline, the consultant will provide County staff with a final annotated outline incorporating, where appropriate, the comments received.

Draft UDO

The consultant will prepare a draft Unified Development Ordinance that is based on the final annotated outline. After initial review and comments by County staff, the discussion draft will be distributed for review and comment.

The discussion draft should be presented in distinct sections that will permit easy review. (For example: (1) definitions; (2) general provisions and districts; (3) land use regulations; (4) special development standards applicable to one or more uses or districts; and (5) administration and enforcement.) The draft will include extensive use of graphics and illustrations, tables, flow charts, matrices, and any other illustrative methods for facilitating easy use and understanding of the UDO.

The consultant is expected to act as facilitators to resolve disputes and formulate regulations that are acceptable to stakeholders, identifying weaknesses and needed changes. The consultant will describe approach to conducting the draft evaluation, testing and revision processes. It is expected that the draft will have multiple rounds of drafting, circulation, revisions, testing, evaluation, recirculation, and legal review. The consultant is expected to test the draft to identify effectiveness, appropriateness, practical problems, and other inadvertent impacts.

Adoption

Develop an approach for public review of the full draft Unified Development Ordinance. The consultant will prepare a final draft of the UDO to take through the adoption process and work with staff to determine an appropriate effective date. In addition, the consultant will prepare an executive summary and presentation explaining the major points of the final draft: this would explain the draft presented at the public hearing and changes from the original regulation documents and the discussion drafts and/or outlines; including the rationale for such changes.

Administrative Manual

The consultant will develop an Administrative Manual as a companion to the Unified Development Ordinance. The UDO Administrative Manual will be a resource to help members of the general public to navigate various planning and zoning processes. The final manual will be delivered to the County before the adoption of the UDO. Orientation on the manual will be provided by the consultant to Planning and Zoning Staff.

Modifications Assistance

The County may elect to negotiate a contract with selected consultant for on-going consultant support, post adoption for an agreed upon time and price. On call services would include assistance with amendments needed to the UDO and on a quarterly or biannual basis as well as implementation guidance.

Evaluation Criteria, Submission, and Selection

Identifying “Confidential” materials in your RFP

If a proposal includes any propriety data or information, such data or information must be specifically identified as such on every page on which it is found. Data or information so identified will remain confidential only if it meets all of the requirements of North Carolina law, including, without limitation, GS 132-1.2 and will be used by Chatham County personnel solely for the purposes of evaluating proposals and conducting contract negotiations. The practice of labeling unqualified pages as confidential, including the bid form, may result in a proposal being rejected.

Submission Requirements

Interested firms should submit background information about their company, its employees, and its experience with related projects and related clients. Information should also be provided that describes the range of abilities and experience of the firm as related to the required qualifications.

Proposals should include a strong emphasis on creative, strategic approaches to issues faced by the County. Proposals shall include the following components:

1. **Cover letter:** Indicate the firm’s interest in working with Chatham County. Highlight the firm’s background and the point of contact for the firm. The letter should include:
 - a. Company name
 - b. Address (If there are multiple offices, identify location and personnel for offices where the work for this project will be performed.)
 - c. Year established, size of company, background, current workload, and disciplines included on staff; including job titles.
 - d. A statement indicating that the firm is independent, properly licensed to practice in the State of North Carolina, and has no conflict of interests with regard to any other work performed by the consulting firm for the County.
2. **Table of Contents**
3. **Summary** A detailed narrative statement of the firm’s perception of the project requirements. Outline any unique features or conditions that appear to need special attention that the firm and proposed project team may be particularly well qualified to address.
4. **Project Team Background:** Include professional resumes for key personnel that would be assigned to this project. Identify consultant by name, job title, job description, level of responsibility on this project, roles in projects of similar scope, specialized technical knowledge and education, and period of service with the firm. Also, include information about any sub-consultants that might be used to perform services such as address, telephone number, contact person, and names and job descriptions of key personnel. (i.e. Hydrologist/geologist, landscape architect, etc.)
5. **Comparable Projects:** List at least three recent comparable project summaries which demonstrate pertinent corporate and key personnel experience in ordinance writing. Summaries should include:
 - a. Community, population size, and geographic size
 - b. Scope of work, type of ordinance, and topic of ordinance.
 - c. Current status with project timeframe and completion year if applicable.
 - d. Reference contact information (name, title, community, and current telephone & email)
 - e. Link to UDO
 - f. Additional relevant information may be included.
6. **Method of Approach:** A detailed narrative that presents the services the firm will provide and what strategies will be used to achieve the scope of services and scope of work. This should include:
 - a. A scheduled timeline of benchmarks and tasks. This includes the process for completion of each task and overall estimate for final draft completion and adoption. Include not-to-exceed cost for

all proposed services. If the proposed timeframe of four years is not anticipated to be completed, provide a revised anticipated task schedule.

- b. An outline of engagement strategy for the recommending boards and stakeholder groups.
- c. An organizational chart of key personnel, their roles and project management approach.

7. Proposed Fee:

Include a cost proposal consisting of the consulting firm's fees for performing the services required as detailed in your proposal:

- The costs breakdown for all expenses, including direct and indirect fees for each of the project benchmarks and tasks identified;
- If the use of sub-consultants is proposed, a separate schedule of expenses must be provided for each sub-consultant;
- Identify the total cost for completing each work task;
- Hourly rates and number of hours by task assigned to individual members of the team;
- A summary of estimated labor hours by tasks that clearly identifies the project team members and the number of hours performed by each team member by task;
- Costs for travel, lodging, and meals. Identify the minimum number of trips to and from Chatham County that will be required, the number of persons and days for each trip, and the project phase and task during the trip(s) will occur;
- Costs for any optional tasks, products, or services identified in the Proposal;
- Costs for any additional tasks, products, or services beyond those requested in this RFP that are incorporated in the Proposal;
- Provide a fee schedule for supplemental charges that would be charged for additional unforeseen work tasks beyond those proposed/anticipated in the Proposal; should such services be required, such as; fees for conducting additional meetings with County staff; additional trips to and from Chatham County; additional iterations/revisions of product deliverables. Provide per-occurrence, per-unit, or per-hour rates, as appropriate, for such additional services.
- Provide any additional information the respondent believes to be relevant to Chatham County's selection efforts.
- Proposals should be all-inclusive detailing your best offer.
- Include completed Attachment A, Vendor Signature Form.

Proposal Selection Process

Consultant selection will be considered by a five to seven member Selection Committee with staff representatives from the Planning Department, Watershed Protection Department, Finance Department, and Manager's Office. Consultants will work under the direction of the County Project Manager & County Planning Director.

The proposals will be evaluated by the Selection Committee. The Selection Committee reserves the right to request more information from consultants submitting proposals. Each selection committee member will review and evaluate each proposal. The Team will meet together, and determine the importance of each criteria item generating the points assigned according to the matrix (see Attachment B). Each individual proposal shall be awarded points for each evaluation criteria within their proposal with Below Meets (1 point), Meets (2 points) and Above Meets (3 points). The firm's individual value for the criteria item is multiplied by the total value for the specific item generating the weighted score for that firm, per criteria item. The highest accumulated scoring proposals will be considered. If it is determined that a short list should be developed, interviews may be conducted with the top two or more

firms by the county panel, after which final discussions will take place. At the conclusion of the evaluation process, the Panel will, in order of preference, conduct negotiations with the Offerors, starting with the highest ranked proposal and continuing until a contract, satisfactory to the County, is agreed upon. Award will be recommended for one firm. Chatham County shall award the contract for the project as one to the most qualified firm and reserves the right to reject any of and all proposals.

The following criteria will be weighted and considered in evaluation of the proposal by the Selection Committee:

- A. Clear demonstration of firm’s specialized experience and technical competence in management of successful comparable projects.
- B. Qualifications of key personnel who will have direct involvement on this project. Specifically demonstrate the technical competence to manage, write, rewrite, consolidate and implement comparable projects.
- C. Evaluation of past projects in the last 5 years with special attention paid to projects conducted with local government counties and municipalities. Factors evaluated include quality of work, cost control, attention to detail, recommendation from provided references, key personnel, and demonstrated ability to meet scheduled deadlines.
- D. Familiarity with the Piedmont Region and Chatham County, NC. (i.e. geographic conditions, local economy, environment, and experience specific to land use law and North Carolina General Statutes.)
- E. The firm’s approach and demonstrated understanding of the project. Although the County has identified the general nature of services required, the consultant is given leeway toward the approach to the methodology to provide the proposed services.
- F. Clear demonstration of capability to develop successful engagement strategy/schedule for county staff, recommending boards, and stakeholder groups.
- G. Project Timeframe
- H. Proposed Budget
- I. Submitted proposal is clear, complete, and contains correct information

Prior to the final decision, the county intends to hold on site, in person interviews for the top 2-3 candidates before the final selection. See schedule below:

| | |
|---|------------------------------------|
| January 31st | Issue RFP |
| February 21st | Deadline for Inquiries |
| February 28th | Submittal Deadline |
| March 1st – March 15th | Proposal Reviews |
| March 20th – 26th | Interviews |
| March 29th | Selection |
| April 15th | Contract Award & Project Ordinance |
| TBD | Contract |

Proposal Instructions

Proposal Deadline: Must be received by Chatham County no later than **February 28th, 2019 5:00 PM EST.**

Submission of Proposals: The County is requesting 5 hard copies and one electronic media or by email. Hard copies must be sent to one of the following delivery addresses:

Postal Address: Robin James, Chatham County Finance Office,
P. O. Box 608, Pittsboro, NC 27312

Street Address: Robin James, County Finance Office,
Courthouse Annex, 12 East Street, Pittsboro, NC 27312

Email: robin.james@chathamnc.org **(only for digital copy)**

Withdrawal of Proposals: Proposing vendors may withdraw their proposals any time before the deadline for submission on **February 28th, 2019** but the withdrawal must be submitted in writing and signed by the proposing vendor.

Inquiries and Corrections: All inquiries relating to this request should be in writing and addressed to:

Robin James, Chatham County Finance Office
P.O. Box 608 Pittsboro, NC 27312

They also may be faxed to 919-545 -2417 or emailed to: Robin.james@chathamnc.org

*If a proposing vendor finds discrepancies in or omissions from the specifications or should require additional clarification of any part, a written request for interpretation shall be submitted to Robin James. Any interpretation of or changes made to the RFP will be made by written addendum to each proposing consultant and shall become part of the request for any contract awarded. The County will not be responsible for the accuracy of any other oral explanations, interpretations, or representations. All inquiries must be made by **February 21st, 2019**. It shall be the responsibility of each proposing organization or individual to verify that every addenda has been received prior to submitting proposals.*

Vendor Certification: The submission of proposal shall be deemed a representation and certification that the proposing vendor:

1. Has carefully read and fully understands the information provided by Chatham County in this RFP;
2. Is financially solvent and has the capability to successfully undertake and complete the responsibilities and obligations of the proposal submitted;
3. Represents that all of the information contained in the submitted proposal is true and correct;
4. Did not in any way collude or conspire with any other parties, directly or indirectly, in regard to the amount, terms or conditions of this proposals;
5. Acknowledges that Chatham County has the right to make any inquiry it deems appropriate to substantiate or supplement information provided by proposing vendors and hereby grants Chatham County permission to make these inquiries; and
6. Acknowledges that any proposal cannot be modified after its submission for any reason.

Format & Deadline of Proposals: Late proposals will not be accepted under any circumstance and will not be opened or reviewed. We will not accept proposals by fax or any method. The sender must allow ample delivery time for the selected shipment or transmission methods.

Definition and Context: Unless otherwise specified in this document, all words shall have a common meaning unless the context in which they are used clearly requires a different meaning. Words in the singular number include the plural, and in the plural include the singular.

Insurance and Legal Requirements

Insurance Requirements

Chatham County requires selected contractors and any subcontractors to obtain and maintain, at their own expense, all insurance required by state and federal law. If requested, the selected organization agrees to provide Chatham County with evidence of required policies, certificates and/or endorsements upon the award of the contract. At a minimum, contractors and subcontractors are required to have the following coverage related to any contract work for Chatham County:

- Workers compensation as required by the State of North Carolina.
- Professional liability, including errors and omissions, malpractice (if applicable) and negligent performance—at least \$1 million for all damages.
- Comprehensive general liability, including personal injury, broad form property damage blanket contractual and fire legal liability--\$1 million combined limit for bodily injury and property damage.

The County shall be named as an additional insured on both the professional liability and comprehensive general liability coverage. Contractor shall furnish copies of all such policies and all renewals, terminations and alterations to the County on a current basis.

E-Verify

Effective September 4, 2013 North Carolina local government units are prohibited from entering into certain contracts unless the contractor and the contractor's subcontractors, if any, comply with the requirements of N.C. Gen. Stats. §64-26(a). Prior to providing any services hereunder, Contractor and Contractor's subcontractors, if any, are subject to the provisions of N.C. Gen. Stats. §64-26(a). Contractor agrees to fully comply with such statute and require Contractor's subcontractors, if any, to fully comply with such statute.

Iran Divestment Act

Effective October 1, 2015 North Carolina local government units are prohibited from entering into certain contracts unless the contractor and the contractor's subcontractors, if any, comply with the requirements of §143C-6A-5. Contractor agrees to fully comply with such statute and require Contractors subcontractors, if any, to fully comply with such statute.

DIVESTMENT FROM COMPANIES THAT BOYCOTT ISRAEL:

Contractor certifies that (a) it is not identified on the Israel Boycott List or any other list created by the NC State Treasurer pursuant to NC G.S. 147-86.80 et al, and (b) it will not take any action causing it to appear on any such list during the term of the Contract Agreement.

County Conditions

All proposing firms or individuals shall comply with all conditions, requirements, and specifications contained herein, with any departure constituting sufficient cause for rejection of the proposal. However, Chatham County reserves the right to change the conditions, requirements and specifications as it deems necessary.

1. The proposal must be signed by a duly authorized official of the proposing organization or individual submitting the proposal.
2. No proposals will be accepted from any person or organization that is in arrears for any obligation to Chatham County, or that otherwise may be deemed irresponsible or unresponsive by county staff or the Chatham County Board of Commissioners.
3. Chatham County is not obligated to enter into any contract as a result of the RFP.
4. All prices quoted must be firm for a period of 90 (ninety) days following the Proposal deadline.
5. Chatham County reserves the right to reject any and all proposals or any part thereof and to select the most responsive proposal that is deemed in the best interest of Chatham County.
6. Only one proposal can be awarded as the result of the RFP.
7. Chatham County may approve or disapprove the use of specific proposed subcontractors in any proposals.
8. Chatham County reserves the right to enter into an agreement with another proposing vendor in the event that the originally selected vendor fails to execute a contract with the County or defaults on their contract.
9. All proposals shall be prepared in a comprehensive manner as to content, but we do not require specific types of binders or promotional material for submissions. Promotional material will not be considered part of the proposal and will not affect the evaluation of proposals.
10. Chatham County reserves the right to negotiate with any, none or all of the proposing vendors.
11. All costs, including travel and expenses, incurred in the preparation of this proposal will be borne solely by the proposing company.
12. The County will not return proposal materials to those submitting proposals.
13. Attachment A, the completed vendor form, with the proposal document.
14. No agreements with any selected vendor shall be binding until a contract is signed and executed by the County Manager and authorized representatives of the vendor.
15. Insurance Requirements- Chatham County requires selected contractors and any subcontractors to obtain and maintain at their own expense all insurance required by state and federal law. If requested, the selected organization agrees to provide Chatham County with evidence of required policies, certificates and/or endorsements upon the award of the contract.

The County of Chatham is an Equal Opportunity Employer and does not discriminate on the basis of sex, marital status, race, color, creed, national origin, age, or disability.



**ATTACHMENT A
Vendor Information & Signature Form**

| | |
|---|---|
| Name of Vendor: | |
| Trade License # (if applicable) | |
| Contact Person(s) | |
| Street Address with City, State & Zip Code | |
| Mailing Address (if different than above) | |
| Phone # | |
| Fax # | |
| Email | |
| Proposer will do the work as: | <input type="checkbox"/> Individual <input type="checkbox"/> Joint Venture <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation |
| Date & state of incorporation | Date State |
| Name of partnership or joint venture | |

By signing below, the respondent acknowledges he/she is authorized to act on behalf of the stated vendor and bind the firm in the contracted services if selected.

| |
|----------------------------|
| Bidder Signature: |
| Date Signed: |
| Title of Signatory: |

Attachment B

| EVALUATION MATRIX FOR PROJECT NAME | | | | | | | | | | | | | |
|--|--|--|--|--|---|-------|--------|-------|--------|-------|-----|-------|--|
| PHASE 1 - CRITERIA AND THEIR WEIGHTS | | | | | PHASE 2 - VENDOR SCORING | | | | | | | | |
| | | | | WEIGHT Base weight of "1" plus actual points | firm 1 | | firm 2 | | firm 3 | | RAW | FINAL | |
| | | | | | RAW | FINAL | RAW | FINAL | RAW | FINAL | RAW | FINAL | |
| A | | | | A = | | | | | | | | | |
| A | | | | B = | | | | | | | | | |
| B | | | | C = | | | | | | | | | |
| B | | | | D = | | | | | | | | | |
| | | | | E = | | | | | | | | | |
| | | | | F = | | | | | | | | | |
| | | | | G = | | | | | | | | | |
| | | | | H = | | | | | | | | | |
| | | | | I = | | | | | | | | | |
| | | | | J = | | | | | | | | | |
| | | | | Totals | | | | | | | | | |
| 1. Relative weight assigned to each criterion is based on the Committee's comparison of each criterion against all others using the following values. Examples using a 7- and 8-member committee 1 = Disagreement among committee 4-3 2 = Majority of committee in agreement 5-2 3 = Unanimous or almost unanimous agreement 6-1 or 7-0 | | | | | 2. Proposers are rated by evaluating each proposal against the RFP requirements using the Evaluation Criteria. Raw score resulting from this evaluation based on the following scale. 1 = Below 2 = Meets 3 = Above | | | | | | | | |
| A point value of one is included as the initial basic weight for all Evaluation Criteria prior to beginning the analysis. In addition, each criterion's total points are added. | | | | | | | | | | | | | |
| Evaluation Criteria are listed in no particular order. The weighting process will provide relative value. | | | | | | | | | | | | | |
| Evaluation Criteria Actual Criteria are developed by Owner for the specific project to be evaluated. | | | | | | | | | | | | | |
| A. Clear demonstration of firm's specialized experience and technical competence in management of successful comparable projects. | | | | | | | | | | | | | |
| B. Qualifications of key personnel who will have direct involvement on this project. Specifically demonstrate the technical competence to manage, write, rewrite, consolidate and implement comparable projects. | | | | | | | | | | | | | |
| C. Evaluation of past projects in the last 5 years with special attention paid to projects conducted with local government counties and municipalities. Factors evaluated include quality of work, cost control, attention to detail, recommendation from provided references, key personnel, and demonstrated ability to meet scheduled deadlines. | | | | | | | | | | | | | |
| D. Familiarity with the Piedmont Region and Chatham County, NC. (i.e. geographic conditions, local economy, environment, and experience specific to land use law and North Carolina General Statutes.) | | | | | | | | | | | | | |
| E. The firm's approach and demonstrated understanding of the project. Although the County has identified the general nature of services required, the consultant is given leeway toward the methodology to provide the proposed services. | | | | | | | | | | | | | |
| F. Clear demonstration of capability to develop successful engagement strategy/schedule for county staff, recommending boards, and stakeholder groups. | | | | | | | | | | | | | |
| G. Project Timeframe | | | | | | | | | | | | | |
| H. Proposed Budget | | | | | | | | | | | | | |
| I. Submitted proposal is clear, complete, and contains correct information | | | | | | | | | | | | | |

EXAMPLE SHOWING CRITERIA LETTER AND POINTS ASSIGNED.

PHASE 1 - CRITERIA AND THEIR WEIGHTS

| | B | C | D | E | F | G | H | I | J | WEIGHT |
|---|---|---|---|---|---|---|---|---|---|---------------------------------------|
| | | | | | | | | | | Base weight of "1" plus actual points |
| A | | | | | | | | | | A = |
| A | | | | | | | | | | B = |
| | | | | | | | | | | C = |
| | | | | | | | | | | D = |
| | | | | | | | | | | E = |
| | | | | | | | | | | F = |
| | | | | | | | | | | G = |
| | | | | | | | | | | H = |
| | | | | | | | | | | I = |
| | | | | | | | | | J | J = |
| | | | | | | | | | J | Totals |

1. Relative weight assigned to each criterion is based on the Committee's comparison of each criterion against all others using the following values.
 Examples using a 7- and 8-member committee
 1 = Disagreement among committee 4-3 4.4
 2 = Majority of committee in agreement 5-2 5.3 or 6-2
 3 = Unanimous or almost unanimous agreement 6-1 or 7-0 7-1 or 8-0

A point value of one is included as the initial basic weight for all Evaluation Criteria prior to beginning the analysis. In addition, each criterion's total points are added.

The weight of each criteria point is determined by the Selection-Evaluation Committee when they meet together after all have independently read and reviewed each submittal.

Criteria A is compared to Criteria B to determine which is more important between the two items only.

The point value for that item only is determined by the vote above, assigned upon the degree of agreement of the committee.

"A" is compared individually to B, then C, then D, etc until compared with all.

Then, "B" is compared to C, then D, etc.

This is continued until each item has been compared individually.

The point value for each Criteria letter is totaled, and a base point of "1" is added for the total weight of that criteria Letter, (A,B,C,etc)

PHASE 1 - CRITERIA AND THEIR WEIGHTS

| | B | C | D | E | F | G | H | I | J | WEIGHT |
|---|---|---|---|---|---|---|---|---|---|---------------------------------------|
| | | | | | | | | | | Base weight of "1" plus actual points |
| A | | | | | A | | | | | A = |
| A | | | | | 3 | | | | | B = |
| | | | | | | | | | | C = |
| | | | | | | | | | | D = |
| | | | | | | | | | | E = |
| | | | | | | | | | | F = |
| | | | | | | | | | | G = |
| | | | | | | | | | | H = |
| | | | | | | | | | | I = |
| | | | | | | | | | J | J = |
| | | | | | | | | | J | Totals |

1. Relative weight assigned to each criterion is based on the Committee's comparison of each criterion against all others using the following values.
 Examples using a 7- and 8-member committee
 1 = Disagreement among committee 4-3 4.4
 2 = Majority of committee in agreement 5-2 5.3 or 6-2
 3 = Unanimous or almost unanimous agreement 6-1 or 7-0 7-1 or 8-0

A point value of one is included as the initial basic weight for all Evaluation Criteria prior to beginning the analysis. In addition, each criterion's total points are added.

SAMPLE ONLY

