



2040 Comprehensive Plan Update
for the
Town of Mooresville, North Carolina
Request for Qualifications (RFQ)
RFQ 018-09-0002

Issued By: Town of Mooresville

Planning & Community Development Department

Issued: September 27, 2017

Proposals Due: January 31, 2018, 4:00 PM EST

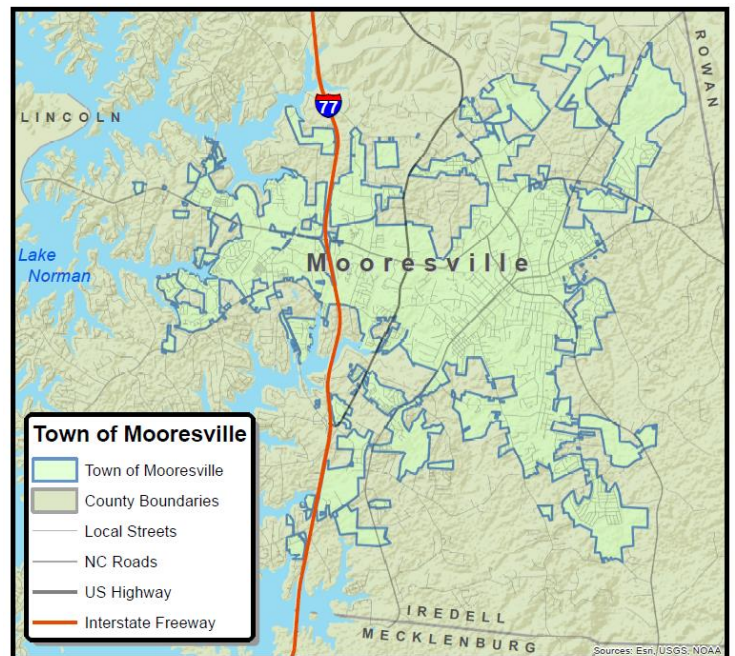
1. Introduction

The Town of Mooresville, North Carolina (“Town”) is seeking submittals from qualified planning professionals (individual firms or teams of consultants) for an update of the Town’s Comprehensive Plan (“Comp Plan or the Plan”). The Town is interested in firms capable of providing professional services including, research, analysis, mapping, public engagement/visioning and document preparation.

The 2040 Comprehensive Plan Update will be used by Town staff, government agencies, economic development entities, elected officials, citizen appointed boards and commissions, developers, property owners, and residents as a guide for future land use development, capital investments and growth management decisions over the next 20 years. The Plan will serve as the primary policy document to guide decisions related to growth, quality of life, and capital investments. The Plan will provide clearly stated strategies for development that will help to prioritize key projects for implementation by both the public and private sectors. The document will include text, maps, figures, and renderings to clearly convey the strategies of the Plan. These strategies should also be clearly outlined in an implementation matrix that will guide and inform the annual budgeting process, including public investments consistent with the plan’s vision. Continued strong residential and non-residential growth throughout the Town make preparation of the Comprehensive Plan a vitally important document for guiding the growth and development of Mooresville and the surrounding community for the next 20 years.

2. Community Background

The Town of Mooresville, with a 2010 Census population of 26,854 and 2016 estimate of nearly 40,000, is a Lake Norman community, located approximately 20 miles north of Charlotte in south Iredell County, in the southwestern piedmont of North Carolina. The Town is located near rapidly growing areas of northern Mecklenburg County and southern Iredell County. Much of this growth is due to high accessibility to Interstate I-77, an expanding employment base, area schools and the region’s high quality of life. Mooresville is located within the Charlotte MSA, is one of the fastest growing regions in the country. Mooresville is one of the fastest growing communities in the greater Charlotte region. The Town has nearly doubled its population since 2000 and continues to attract new residents, businesses, and industry.



Mooresville is, by most measures, a prosperous community with a median income of \$63,792, which is higher than the national median income of \$53,889 (2015 dollars; source: Census QuickFacts). Before Mooresville’s incorporation in 1873, the Town’s first development patterns were shaped by a cotton farming and a textile economy spurred by rail access. Mooresville grew with the economic success of its cotton mills, along with investments in housing, government, and community facilities. Like many similar mill towns in the Piedmont region of the Carolina’s, Mooresville was a self-contained community, with many of the residents benefiting both directly and indirectly from its textile economy.

In 1999, when Burlington Industries shuttered its mill operations, Mooresville had already reshaped its image from mill town into “Race City USA”, and had diversified its industrial and economic base as it geared for growth. Due largely for its forward-thinking endeavors, Mooresville boasts award-winning schools and a vibrant business environment. From Lake Norman to the Downtown, Mooresville is an attractive destination to live, work and play. Those early seeds of change produced a thriving town and a regional leader in championing a smarter way of accommodating growth.

3. Project Background

Through the application of its adopted comprehensive land use, transportation, small area plans, and Zoning Ordinance, the Town of Mooresville has cultivated a balanced, sustainable land development pattern that will accommodate planned growth, efficiently utilize public infrastructure, and protect rural and environmental resources. Mooresville experienced unprecedented growth and change in the last 20 years. The rate of population growth began to increase in the 1980s and accelerated dramatically in the 1990s. At the same time, Mooresville changed from a self-contained industrial community to a rapidly urbanizing, multi-faceted municipality. Mooresville is a mix of small town, suburban, and urban development. Projections show the Town to double its population in the next 20 years.

In 2006, the Town initiated three parallel planning projects that lead to the adoption of the Comprehensive Land Use Plan, the Comprehensive Transportation Plan, and the Zoning Ordinance in 2008. Public engagement for these projects began early and continued throughout the process. Recognizing the relationship between land use and transportation, the Comprehensive Land Use Plan and Comprehensive Transportation Plan teams held joint public workshops that provided participants the opportunity to share their ideas for the future and discuss plan concepts. The Comprehensive Land Use Plan and Comprehensive Transportation Plan received oversight from Citizen Advisory Committees. These committed citizen volunteers worked to ensure the vision, goals and objectives for the two plans were developed based on broad goals that set a strategy for managing growth and development.

The Mooresville Comprehensive Land Use Plan has provided vision, strategy, and framework for decision making about the Town’s growth and development throughout the document’s useful lifespan. These inter-related policy and regulatory documents have been instrumental tools in Mooresville’s transitioning from a dispersed pattern of low density development to a more compact pattern that includes an integration of land uses in mixed-use nodes and activity centers.

The Mooresville Comprehensive Transportation Plan, developed concurrently with the Mooresville Comprehensive Land Use Plan, recognizes the inherent relationship between land use and transportation. Through a forward-looking innovative approach, the plans call for an integrated transportation network that consists of roadway, bicycle, pedestrian and air transportation elements. These essential transportation elements of influence how land is developed in terms of density and types of use. The Town’s transportation solutions are designed to address congestion, support economic development, incorporate environmental stewardship, and be implemented through a “think regionally, act locally” collaborative, intergovernmental approach supported and enforced by local decision makers.

Several comprehensive and small area planning documents are active polices that affect development in and around Mooresville. A thorough review of these plans should occur, with relevant policies and goals from these plans incorporated into the 2040 Comprehensive Plan, wherever possible, consistent with the Town’s vision for the future growth and development of Mooresville and its extra-territorial jurisdiction.

Outlined below is a list of adopted plans, which along with the Town of Mooresville Zoning Ordinance, have long-range planning implications for Mooresville:

Town Adopted Plans and Policies

- Town of Mooresville Comprehensive Land Use Plan 2008
- Town of Mooresville Comprehensive Transportation Plan 2008
- Town of Mooresville Zoning Ordinance 2008
- Town of Mooresville Comprehensive Housing Strategy 2016

Town Adopted Small Area Plans

- Cascade Neighborhood Small Area Plan 2003
- Mount Mourne and South Iredell Master Plan 2006
- Brawley School Road Small Area Plan 2009
- Cornelius Road Small Area Plan 2009
- Downtown Master Plan 2009
- NC 3 Corridor Study 2009
- Highway 21 Corridor Study 2010
- Alcove Road Small Area Plan 2014

It is expected that the 2040 Comprehensive Plan will consolidate and update all the above plans into a master policy document. It is the hope of the Town that the 2040 plan update will tie together the land use and transportation policies into a document that would be updated concurrently into the future. The 2040 Comprehensive Plan Update will “roll in”, expand upon, and serve as the Town’s Comprehensive Transportation Plan.

4. Scope of Work

The following Scope of Work is intended to guide preparation of the 2040 Comprehensive Plan Update for the Town of Mooresville. This list indicates the “minimum” level of content for the plan. The Town expects that the Final Scope of Work for the plan will be modified to reflect suggestions by the consultant/team chosen to prepare the plan.

PHASE I

- Background Research and Analysis – Undertake data collection and analysis of key socioeconomic and geographic data, including population, housing, commercial and industrial development, land use, natural resources, transportation, utilities, public (including recreation) facilities and historic assets. Review and assess all previous long range plans (prepared by the Town and other agencies) and prepare a summary document detailing relevance and applicability of the previous plans. Review of “Unified Development Ordinance (UDO)”, associated development regulations and zoning map. **Deliverables:** *Summary Report and mapping of data; summary report of prior applicable studies, plans and development regulations.*
- Public Engagement – The Town desires an aggressive, creative, and far-reaching public input strategy. Including, but not limited to, stakeholder meetings, social media, MindMixer (or some other comparable software), and other creative input mechanisms. Develop a comprehensive public engagement strategy in coordination with Town staff to solicit input from a broad cross-section of Town residents, business owners and other stakeholders (including Town Board, Town

staff and citizen boards and commissions) to inform the comprehensive planning process and serve to identify specific “Focus Areas”, which will guide the plan’s preparation.

As a starting point, the Town requests that the plan update address the following “Focus Areas”, in addition to any others identified during the public engagement process:

1. **Growth Management** (strategies and policies that ensure growth and development occurs within the capacity of the Town’s infrastructure and service capacity);
2. **Transportation** (ensuring that growth occurs within the capacity of the transportation system to handle);
3. **Redevelopment** (strategies for repurposing and revitalizing older areas of Town and promoting infill; including Downtown);
4. **Land Use** (strategies to ensure highest and best use of land)

Deliverables: *Multi-faceted public engagement process utilizing social media, surveys, MindMixer or other such platform, community outreach and other means to insure a comprehensive and robust level of public input, which will serve to guide development of the plan’s vision and goals.*

- Plan vision and goals – Oversee and manage “visioning” process to develop overall vision statement for the Town of Mooresville Comprehensive Plan Update, including vision statements for each of the plan elements along with goals to guide implementation of this vision. **Deliverables:** *Vision statement for 2040 Comprehensive Plan Update and individual plan elements, along with goals for each plan element.*

PHASE II

- Draft Plan - Based on public engagement process (under guidance of planning staff) prepare “*Draft Comprehensive Plan*”. At a minimum, the plan shall include an Executive Summary, introduction, vision, goals and objectives, along with policy recommendations to guide land use development, environmental protection and preservation of historic and cultural resources for each of the plan elements. Plan should also address recommendations for regulatory changes, including zoning and the Zoning Ordinance content, as well as suggested modifications to the development plan review/entitlement process. Plan shall also include charts, tables, illustrative drawings, graphics, maps and other supporting documentation, including population projections, build out scenario and preferred land development pattern. **Deliverables:** *Draft Comprehensive Plan.*
- Plan Implementation Strategy – Comprehensive implementation strategy shall be developed to guide implementation of Comprehensive Plan. The strategy will identify staff and capital resources necessary to implement the plan, along with a timetable and prioritization ranking. Consideration to be given to integration of Comprehensive Plan and coordination with the Town’s Capital Improvement Plan (CIP). **Deliverables:** *Plan Implementation Strategy.*
- Final Plan – Preparation of Final Plan document, including appendices and maps in hard-copy (30 copies) and digital formats. **Deliverables:** *Final Plan (hard copy & digital formats), along with all electronic files.*

5. Coordination with Town Staff

Oversight and guidance for preparation of the 2040 Comprehensive Plan Update will be provided by Planning and Community Development Department staff, under the direction of the Planning Board and Town Board.

6. Time Frame

The Town anticipates the following timetable for completion of the 2040 Comprehensive Plan Update, with key dates noted below. A final schedule will be adopted as part of the contract between the Town and consultant chosen to prepare the plan.

Preliminary Comprehensive Plan Schedule:

Action	Date
RFQ Issued	09/27/2017
RFQ Responses Due	01/31/2018 4:00 PM
Firms Short-listed	2/15/2018
Firm Interviews	2/2018
Selection of Firm	3/2018
Contract Approval by Town Board of Commissioners	4/2018
Project Start	5/2018
Project Completion (Plan Adoption by Town Board of Commissioners)	7/2019

7. Funding

The 2040 Comprehensive Plan Update project will cover two (2) fiscal years (2017-18 & 2018-19) and have a total dedicated budget of \$200,000. Funding for the plan is intended to span both fiscal years, with \$100,000 approved for FY 2017-18. Funding to complete the plan will be finalized as part of the FY 2018-19 budget approval process.

8. Request for Clarification & Additional Information

Any request for clarification or additional information of a technical nature regarding this RFQ shall be submitted in writing and directed to:

Rawls Howard, AICP
Planning & Community Development Director
Town of Mooresville
413 North Main Street; P.O. Box 878
Mooresville, NC 28115
Email: rahoward@ci.mooresville.nc.us
Office: 704-799-7597

9. Submittal Format and Content

The Statement of Qualifications should be presented in the following general format:

- 1) *Transmittal Letter:* Designated contact person with address and telephone number.
- 2) *Project Manager:* Identify project manager and describe their experience related to this project. Provide client references for project similar in scope. Discuss the experience of this project manager with other members of the project team.
- 3) *Project Team and Sub-Consultants:* Identify other team members and sub consultants and their relative experience. Discuss the role of key team members. Specify the percentage and type of work that will be performed by each team member and any sub-consultants. This information will become part of the contract with the selected firm.
- 4) *Firm Qualifications:* Discuss the firm's work on projects similar in size and complexity. Quality assurance should be addressed. Indicate firm's history of meeting established schedules. In addition:
 - Lead consultant's office should be located within driving distance of the Town. Consultant's office must have appropriate support staff for a project of this size and complexity; please identify the office size and number of staff and percentage of time to be devoted to project. Consultant should identify a team matrix of all personnel working on project, including office location and specialty.
 - Consultant should demonstrate experience on at least (3) similar projects, preferably within the past five (5) years.
 - Consultant shall discuss their experience and strategy with public engagement and outreach to the community during the Project.
 - A concise narrative that presents the services a firm would provide detailing the approach, methodology, deliverables, and client meetings.
 - A summary of any suggested innovative approaches the Town should consider for this effort.
 - A timeline for the preparation and implementation of the tasks/activities being proposed per the **Scope of Work** detailed in this RFQ.

10. Evaluation of Statements of Qualifications

Responses submitted by consultant firms and/or teams will be evaluated based on the following criteria:

1. Experience of firm(s) with projects of a similar scope and scale;
2. Qualification and experience of the proposed team and location of team members;
3. Current workload and firm workload capacity;
4. Responsiveness to RFQ and quality of the submittal;
5. Proposed approach to project and schedule for completion;
6. Performance assessments and/or references on past work efforts;
7. Knowledge of the Town of Mooresville and surrounding region;
8. Any other experience or criteria deemed applicable to the projects.

11. Short-List, Interviews and Selection

The Town will review Qualification Statements and prepare a short list of candidates to interview. The short-listed firms will be notified by phone and/or email by February 15, 2018, with interviews scheduled before the end of February. Notification may not be sent to firms not short-listed. After selection by the Town, a final contract will be negotiated with the selected firm(s). It is anticipated that a final contract will be signed by no later than the end of April, 2018.

12. Negotiating Offers

If a contract cannot be negotiated with the best qualified firm, negotiations with that firm shall be terminated and initiated with the next best qualified firm.

13. Submission Requirements

Firm(s) interested in being considered for this project should submit three (3) bound copies and one (1) electronic version via email or flash drive of their Statement of Qualifications no later than 4:00 p.m. on January 31, 2018.

14. Delivery of Proposals

Proposals are due no later than 4:00 pm EST on January 31, 2018. Proposals should be delivered to the attention of:

Rawls Howard, AICP
Planning & Community Development Director
Town of Mooresville
413 North Main Street; P.O. Box 878
Mooresville, NC 28115
Email: rahoward@ci.mooresville.nc.us