



Town of Bluffton

Request for Qualifications

RFQu # 2021-20

Comprehensive Plan Update and Planning Services

1. PURPOSE

The Town of Bluffton invites qualified consultants to submit statements of qualifications to prepare an **UPDATE OF THE TOWN OF BLUFFTON COMPREHENSIVE PLAN** and to **PROVIDE ONGOING PLANNING SERVICES**. Proposals will be accepted from individuals, firms, or groups of firms who can demonstrate they have the resources, experience, and qualifications to provide the services requested herein. Proposals may be submitted for any or all requested services, including individual elements of the Comprehensive Plan. There is no incentive for the Town to select the same consultant to provide both updates to the Comprehensive Plan as well as future planning services. If a Respondent wishes to bid on just one service, the Town encourages application.

An updated Comprehensive Plan will provide a fresh long-range vision for the Town of Bluffton (Town). Initially adopted by the Town in 2007, the Comprehensive Plan was last amended in 2014. The Comprehensive Plan shall comply with the South Carolina Local Government Comprehensive Plan Enabling Act of 1994, as amended, and will serve as the overarching policy document that directs the Town in the implementation of consensus-based goals and strategies for implementation over the ten (10) year period following its adoption. The vision and policies of the Comprehensive Plan will involve many aspects of Town administration and community life, providing a common point of reference for those involved in shaping the Town's future, including elected and appointed officials, Town staff, citizens, businesses, and civic organizations. Adoption of an updated Comprehensive Plan should occur no later than June 2022. The approved budget for the Comprehensive Plan Update and Planning Services is \$150,000 for FY 2020-2021. It is anticipated that work on the Comprehensive Plan will continue into FY 2021-2022, for which a budget has not yet been approved.

Planning Services are also sought on an as-needed basis to assist Town Staff with development-related reviews, studies and historic preservation matters, which may include surveys, grants and tax incentives. Proposals to provide only Planning Services without Comprehensive Plan assistance are acceptable.

2. BACKGROUND

A. Town of Bluffton

Since the initial 2007 Comprehensive Plan, the Town of Bluffton has become one of the fastest growing communities in the state of South Carolina. Just one-square mile in 2001, annexation has expanded the Town's boundaries to more than 54 square miles. The availability of developable land (mostly former timberlands) and its close proximity to Hilton Head Island and Savannah, Georgia have allowed Bluffton to

become a desirable community for both families and retirees. From April 2010 to July 2019, the American Communities Survey estimates that the population of Bluffton grew from 12,530 residents to 25,557 residents (95.8%). This growth, however, presents challenges as Bluffton navigates its future while retaining its natural, historic and eclectic character as one of South Carolina’s few remaining coastal villages. An updated Comprehensive Plan will serve as critical guide.

B. Organizational Structure of the Comprehensive Plan Update

It is anticipated that the various Stakeholders and their responsibilities will be similar to the below chart.

Stakeholders	Responsibilities
Town Council	<ul style="list-style-type: none"> Establishes scope, process and approves funding and allocation of resources Provides overall guidance and direction throughout the process Reviews and evaluates the Comprehensive Plan recommendation of the Planning Commission Conducts the required adoption process Adopts an updated Comprehensive Plan
Planning Commission	<ul style="list-style-type: none"> Follows the scope and process established by Town Council Provides a Comprehensive Plan recommendation to Town Council
Growth Management Staff	<ul style="list-style-type: none"> Manages the administrative and logistical aspects, including consultant team oversight Manages the public outreach effort in conjunction with the Public Information Office and the consultant team Facilitates meetings with Town staff and other staff from applicable governmental and partner agencies, such as utilities, social services, environmental groups, historic societies, et al Works with the Stakeholders Group to develop a draft Comprehensive Plan in conjunction with the consultant team Provides a staff recommendation on the Comprehensive Plan to the Planning Commission Assists the Planning Commission with its Comprehensive Plan recommendation, as needed
Public Information Staff	<ul style="list-style-type: none"> Directs and manages outside communication and public outreach as assigned Assists with “marketing” the updated Comprehensive Plan
Stakeholder Groups	<ul style="list-style-type: none"> Represents diverse community interests Serves as an advisory group to Town Council and the Planning Commission to assist in the development of the Comprehensive Plan
General Public	<ul style="list-style-type: none"> Residents, business owners, property owners and interested citizens to assist with development of the updated Comprehensive Plan throughout the process and provide feedback

3. SOLICITATION TERMS and CONDITIONS

Respondents’ Responsibility

While the Town has used considerable efforts to ensure an accurate representation of information in this RFQu, each prospective Respondent is urged to conduct its own investigations into the material facts and the Town shall not be held liable or accountable for any error or omission in any part of this RFQu.

Addenda

The issuance of a written addendum is the only official method by which interpretation, clarification or additional information can be given. The Town will not be responsible for any oral representation given by any employee, representative or others. It is the responsibility of the Respondent to check the Town of Bluffton Purchasing web site for any addenda issued. Respondents must acknowledge their bid is subject to all addenda issued by entering the total number of addenda in the place so indicated on the Signatory Sheet, attached.

Questions and Inquiries

Questions and inquiries regarding this solicitation shall be submitted to the Project Manager via email or online via Vendor Registry no later than:

**2:00 pm on Monday, October 19, 2020
via Vendor Registry**

Submittal of Qualification Statements

Response packages shall be received by or prior to:

2:00 pm on Thursday, November 12, 2020

The closing date and time shall be scrupulously observed. Due to the current state of pandemic emergency, packages shall be **PDF submitted electronically through the Vendor Registry portal**. Click the large red **SUBMIT BID** tab to upload the RFP response.

Public Opening of Packages

A public opening will be held five (5) minutes following the submittal deadline via online bid opening. An addendum will be published with separate instructions for all parties who wish to witness the bid opening online.

The name of Offerors submitting responses shall be read aloud and recorded. Intent to Award notification shall be posted on the Town of Bluffton's Purchasing webpage upon final determination. The Town reserves the right to make more than one award depending on the scope or scopes of work on which responses are received. There is no incentive for the Town to select the same consultant to provide both updates to the Comprehensive Plan as well as future planning services. If a respondent wishes to bid on just one service, the Town encourages them to apply.

Late Submittals

Under no circumstances shall proposals be delivered after the time specified. The Town will not be responsible for late deliveries or technical difficulties with Vendor Registry. It is the Respondent's sole responsibility to ensure that submittals are complete and delivered timely. Oral offers or offers by facsimile or email are not acceptable.

Restricted Discussions

All prospective Respondents are hereby instructed not to contact any member of the Town of Bluffton Council, the Town Manager, nor Town of Bluffton staff members other than the named point of contact contained herein or the Town Purchasing & Grants Administrator regarding this opportunity during the solicitation process. Any such contact may be cause for rejection of your submittal.

Acceptance / Rejection

The Town reserves the right to accept or reject any or all submissions. The Town also reserves the right to waive any irregularities, informalities, or technicalities and may at its discretion, request a new solicitation.

Receipt of a submission does not indicate that the Town of Bluffton has pre-determined a company's qualifications to receive an award or contract. Such determination will be made after the opening and will be based on the Town's evaluation of the proposals compared to the specific requirements and qualifications of a firm as contained and described in this document.

Proprietary and/or Confidential Information

A solicitation response is a public document under the South Carolina Freedom of Information Act (FOIA) except as to information that may be treated as commercial, financial, or privileged and confidential as defined by S.C. Code Section 11-35-410. Respondents should mark the pages containing any commercial, financial, or privileged and confidential information as "PROPRIETARY".

SCOPE OF SERVICES

This Scope of Services defines the minimal acceptable performance by the selected consulting team in providing the defined services identified below. The successful consulting team will demonstrate in its proposal the ability to perform these services for the Town of Bluffton. Respondents are encouraged to propose alternate approaches and/or enhancements to the process as part of the methodology and approach of the submittal package.

Scope of Work/Services

The Town intends to award one or more contracts to the most highly qualified firm(s) to provide the below Scope of Services. The anticipated Work and Deliverables sought to be procured through this RFQu includes the following, which may be revised during the Comprehensive Plan development process:

A. Comprehensive Plan: Research, Review and Summary of Existing Data, Standards and Trends

The selected consulting team must have familiarity with the Town of Bluffton's existing Comprehensive Plan, Old Town Master Plan, Strategic Plan FY 2021-2022 and Unified Development Ordinance (UDO). Links to these documents are provided on page 13. Additionally, familiarity with the following is also expected: current and future land use, development history and trends; current characteristics of the regional transportation system and planned improvements and future projects; physical infrastructure (to include utilities, water supply and drainage); economic conditions and projections; environmental characteristics and conditions; cultural and historic resources. Town Staff will assist with obtaining plans, reports, studies, databases, maps and GIS data, among other sources; however, the Respondent(s) should anticipate supplementing data collection with independent research to capture the information necessary to provide the most accurate and comprehensive baseline data for the Town.

From the data collection, an Assessment Report would be provided that identifies the existing development characteristics and existing conditions, as well as regional and national trends that may impact planning and future planning and development for the Town. The report should include graphics, maps, figures, photos and the like to support the assessment. Additionally, the Assessment Report would also briefly indicate how the current Comprehensive Plan responds. The Assessment Report will provide the foundation for a Needs Assessment that would be developed after stakeholder meetings, including at least one (1) public visioning session.

B. Comprehensive Plan: Community Outreach and Engagement Strategy Throughout Project

Public involvement is vital to the development of an updated Comprehensive Plan. The process must be inclusive of all residents, property owners, business owners and other stakeholders who may have an

interest in creating a renewed long-range vision for the Town of Bluffton. Public engagement during the COVID-19 pandemic may be especially challenging as in-person meetings may not be possible for a portion of the Comprehensive Plan update process; therefore, the consulting team selected must be especially attentive to and creative with this task. It is expected that engagement may include but not be limited to the development of a dedicated website or webpage on the Town's website dedicated to the Comprehensive Plan update, surveys, electronic mailings, publications, public comment periods and virtual and in-person meetings (when possible).

It is anticipated that at least three (3) "milestone" public meetings would occur. They include:

1. First Meeting: Comprehensive Plan Update Kick-off / Introduction and Assessment Overview

This meeting is intended to launch the update, educate participants about the purpose of the Comprehensive Plan, provide an overview of the State requirements and how the Comprehensive Plan will be used. It would also provide an opportunity to share the results of the Assessment.

2. Second Meeting: Needs Assessment / Identifying Goals and Policies

Based on the Assessment Report, stakeholder and public visioning meetings, surveys and public comments, deficiencies with the current Comprehensive Plan and community needs would be discussed, which will shape goals, policies and actions to be taken to prepare a draft Comprehensive Plan.

3. Third Meeting: Presentation of the Draft Comprehensive Plan

The draft Comprehensive Plan would be presented to the Planning Commission. Refinements may be required after this meeting.

In addition to these meetings, additional community meetings, workshops and stakeholder meetings may be required. While the selected consulting team would be responsible for meeting content, preparing for and delivering the presentation (whether in-person or virtually), the team will work with Town Staff to develop the format and message. Town staff will also assist with coordination, set-up and technical support.

C. Comprehensive Plan: Needs Assessment

In preparation of the public launch of the Comprehensive Plan Update, the Respondent(s) will begin the process of developing a long-range vision for the Town by analyzing the data collected for the Assessment Report and preparing a Needs Assessment. This information will serve as the basis for preparing the following required Plan elements: Population, Economic Development, Natural Resources, Cultural Resources, Community Facilities, Housing, Land Use, Transportation and Priority Investment.

D. Comprehensive Plan: Visioning and Policy Direction When assessments have been completed, the consulting team will take the lead in evaluating and discussing alternatives, strategies and techniques to address the identified issues and develop a long-range vision for the Town with the assistance of stakeholders (in a format to be determined with the assistance of Town Staff). This task may include determining the efficacy of existing policies, providing options to enhance or eliminate applicable current policies and develop new policies. During this process, the most pressing community issues should also be identified. Of particular interest to the Town are Strategic Focus Areas from the Strategic Plan: Affordable and/or Workforce Housing, Community Quality of Life, Economic Growth, Fiscal Sustainability, Infrastructure and the May River and Surrounding Rivers and Watersheds.

After consideration of the options, including alternatives, stakeholders and Town Staff will work collaboratively to develop policy recommendations for the Comprehensive Plan Update that will achieve the vision. This may require multiple work sessions and would result in a policy draft.

E. Comprehensive Plan: Plan Refinement

At this stage, the Respondent(s) would begin to finalize the draft Comprehensive Plan, including all maps, graphics, text and other items to be included within the Plan.

F. Comprehensive Plan: Preparation and Publication of a Draft Comprehensive Plan

The Comprehensive Plan must include the following, which includes the requirements as specified by the South Carolina Local Government Comprehensive Planning Enabling Act of 1994:

1. Executive Summary
2. An overview of the Town of Bluffton, to include a brief history
3. An inventory of existing conditions
4. The following elements:
 - a. Population
 - b. Economic Development
 - c. Natural Resources
 - d. Cultural Resources
 - e. Community Facilities
 - f. Housing
 - g. Land Use
 - h. Transportation
 - i. Priority Investment
5. For each element, a statement of needs, goals and objectives are to be provided
6. For each element, implementation strategies and a timeline for implementation will be provided.

G. Planning Services: Separate Planning Services, apart from the Comprehensive Plan, are sought by the Town to assist Town Staff with development reviews, Unified Development Ordinance amendments, studies, historic preservation and other related development and planning work on an as-needed basis. This work could include, but is not limited to, master plan amendments, development plans, landscape plans, certificates of appropriateness for Old Town Bluffton Historic District and the Highway Corridor Overlay District, updating the Old Town Bluffton Master Plan and historic preservation-related work, such as surveys, grants and tax incentives. There is no incentive for the Town to select the same consultant to provide both updates to the Comprehensive Plan as well as future planning services. If a Respondent wishes to bid on just one service, the Town encourages them to apply.

For Planning Services, contract deliverables will be addressed on a project-basis for tasks including but not limited to master plan reviews, site development plan reviews and amendments to the Unified Development Ordinance. When the Town desires planning services, the selected Respondent will estimate a level of effort/hourly estimate to complete the requested task using the hourly rates as negotiated in the contract.

Deliverables of the Comprehensive Plan Update Solicitation

The successful Respondent shall provide in its Qualification package response to the Comprehensive Plan portion of this RFQu:

- Signatory sheet
- Letter of transmittal
- Past performance
- Project team profile
- Project approach including schedule for the project from start to adoption
- Fee schedule

Deliverables of the As-Needed Planning Services Solicitation

The successful Respondent shall provide in its Qualification package response to the As-Needed Planning Services portion of this RFQu:

- Signatory sheet
- Letter of transmittal
- Past performance
- Project team profile
- Fee schedule

Insurance

The awarded vendor(s) shall provide and maintain at all times during the term of the contract, without cost or expense to the Town, policies of insurance, with a company or companies authorized to do business in the State of South Carolina, and which are acceptable to the Town, insuring the vendor against any and all claims, demands or causes of action whatsoever, for injuries received or damage to property relating to the performance of duties, services and/or obligations of the vendor under the terms and provisions of the contract. The vendor is responsible for a timely provision of certificate(s) of insurance to the Town at the certificate holder address evidencing conformance with the contract requirements at all times throughout the term of the contract.

An original certificate of insurance, indicating that the awarded vendor has coverage in accordance with the requirements of this section, shall be furnished by the vendor to the Town within five (5) working days of such request and must be received and accepted by the Town prior to contract execution and/or before any work begins.

Such policies of insurance, and confirming certificates of insurance, shall insure the vendor is in accordance with the following minimum limits:

Workers Compensation – The Selected Vendor shall agree to maintain Worker’s Compensation Insurance & Employers Liability in accordance with the State of South Carolina Code.

Business Auto Policy – The Selected Vendor shall agree to maintain Business Automobile Liability at a limit of liability not less than \$500,000 each occurrence for all owned, non-owned and hired automobiles.

Commercial General Liability – Commercial General Liability for public liability during the lifetime of a contract shall have minimum limits of \$1,000,000 per claim, \$2,000,000 per occurrence for Personal Injury, Bodily Injury, and Property Damage Liability. Coverage shall include Premises and/or Operations, Independent Contractors, Products and/or Complete Operations, Contractual Liability and Broad Form Property Damage Endorsements. Coverage shall not contain an exclusion or limitation endorsement for Contractual Liability or Cross Liability. Coverage for the hazards of explosion, collapse and underground property damage (XCU) must also be included when applicable to the work to be performed. All insurance policies shall be issued from a company or companies duly licensed by the State of South Carolina. Specific endorsements will be requested depending upon the type and scope of work to be performed.

Professional Liability (if applicable) – The Selected Vendor shall agree to maintain Professional Liability or equivalent Errors & Omissions Liability at a limit of liability not less than \$1,000,000 Per Occurrence. When a self-insured retention (SIR) or deductible exceeds \$10,000, the Town reserves the right, but not the obligation, to review and request a copy of Vendors most recent annual report or audited financial statement.

Additional Insured Requirements – Except as to Workers’ Compensation and Employers’ Liability, said Certificate(s) shall clearly state that coverage required by the contract has been endorsed as follows:

Town of Bluffton, a municipality of the State of South Carolina, its officers, agents and employees as additional insured

The Certificate of Insurance shall unequivocally provide thirty (30) days written notice to the Town prior to any adverse changes, cancellation, or non-renewal of coverage thereunder. Said liability insurance must be acceptable by and approved by the Town as to form and types of coverage.

Delivery and Completion of Work

Each proposal submitted for the Comprehensive Plan Update should include a realistic timeframe for completion of the project consistent with the Town's stated "Scope of Work." The timeframe may be adjusted at the discretion of the Town although it is expected that the tasks associated with the phases outlined in the Scope of Work/Services will be completed within 12-18 months of commencement of work. The work schedule and completion dates shall be adhered to by the Respondent(s), except in such cases where the completion date will be delayed due to acts of God, strikes, or other causes beyond the control of the vendor. In these cases, the Respondent shall notify the Town of the delays in advance of the original completion date so that a revised delivery schedule can be appropriately considered by the Town. Project completion infers separate adoption by the Bluffton Town Council. Adoption of the Comprehensive Plan should be no later than June 2022.

Contractors/Subcontractors to be Satisfactory to Town of Bluffton

The Contract will not be awarded to any Respondent(s) who have failed in any contractual obligations to the Town, or who has on any previous contract performed in a manner unsatisfactory to the Town, either as to the character of the work, the fulfillment of guarantees or the time consumed in its completion. Subcontractors shall also be satisfactory to the Town. Respondent shall identify intended Subcontractors; Subcontracts shall include all Federal, State, local regulatory and other Agency requirements, as well as the insurance requirements of the prime contract between Contractor and the Town.

Compliance

Respondents, with regard to the work performed by it during the contract, will not discriminate on the grounds of race, color, or national origin in the selection and retention of subcontractors, including procurements of materials and leases of equipment. Respondents will not participate directly or indirectly in the discrimination prohibited by Acts and the Regulations, including employment practices when the contract covers any activity, project, or program set forth in Appendix B of 49 CFR part 21. This includes FHWA or FTA specific program requirement.

During the performance of this contract, the contractor, for itself, its assignees, and successors in interest (hereinafter referred to as the "contractor") agrees to comply with the following non-discrimination statutes and authorities, including but not limited to:

- Title VI of the 1964 Civil Rights Act (42 U.S.C. 29000 et seq., 78 stat. 252), (prohibits discrimination on the basis of race, color, national origin); and 49 CFR Part 21;
- The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, (42 U.S.C. §4601) Prohibits unfair treatment of persons displaced or whose property has been acquired because of Federal or Federal-aid programs and projects;
- The Federal-aid Highway Act of 1973, (23 U.S.C. §324 et seq.), (prohibits discrimination on the basis of sex);
- Section 504 of the Rehabilitation Act of 1973, (29 U.S.C. 794 et seq.), as amended, (prohibits discrimination on the basis of disability); and 49 CFR Part 27;
- The Age Discrimination Act of 1975, as amended (42 U.S.C. §6101 et seq.), (prohibits discrimination on the basis of age);

- Airport and Airway Improvement Act of 1982, (42 U.S.C. §47123), as amended, (prohibits discrimination on race, creed, color, national origin, or sex);
- The Civil Rights Restoration Act of 1987, (P.L. 100-209), (Broadened, the scope, coverage and applicability of Title VI of the Civil Rights Act of 1964, The Age Discrimination Act of 1975 and Section 504 of the Rehabilitation Act of 1973, by expanding the definition of the terms “programs or activities” to include all of the programs or activities of the Federal-aid recipients, sub-recipients and contractors, whether such programs or activities are Federally funded or not);
- Titles II and III of the Americans with Disabilities Act, which prohibit discrimination on the basis of disability in the operation of public entities, public and private transportation systems, places of public accommodation, and certain testing entities (42 U.S.C. §§12131-12189) as implemented by Department of Transportation regulations at 49 CFR Parts 37 and 38;
- The Federal Aviation Administration’s Non-discrimination statute (49 U.S.C. §47123) (prohibits discrimination on the basis of race, color, national origin, and sex);
- Executive Order 12898, Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations, which ensures nondiscrimination by discouraging programs, policies, and activities with disproportionately high and adverse human health or environmental effects on minority and low-income populations;
- Executive Order 13166, Improving Access to Services for Persons with Limited English Proficiency, and resulting agency guidance, national origin discrimination includes discrimination because of limited English proficiency (LEP). To ensure compliance, recipients must take reasonable steps to ensure that LEP persons have meaningful access to programs (70 Fed. Reg. at 74087 to 74100);
- Title IX of the Education Amendment of 1972, as amended, which prohibits discrimination on the basis of sex in education programs or activities (20 U.S.C. 1681 et seq.).

Respondents shall at all times comply with all applicable wage and hour acts, including but not limited to the Fair Labor Standards Act (FLSA) (29 U.S.C. 201 et seq); the Davis-Bacon Act (40 U.S.C. 3141 et seq.); McNamara-O’Hara Service Contract act (41 U.S.C. 351 et seq); Contract Work Hours and Safety Standards Act (40 U.S.C. 3701 et seq); Walsh-Healy Public Contracts Act (41 U.S.C. 35 et seq); Copeland Anti-Kickback Act (40 U.S.C 3145).

Respondents shall at all times comply with the Occupational Safety and Health Act (OSH Act)(29 U.S.C. chapter 15) and the South Carolina OSHA-approved state plan, which covers most private sector workers and all state and local government workers.

Respondents shall make best efforts to ensure that minority and disadvantaged businesses are offered a fair opportunity to fully participate in the overall procurement of subcontracted goods and services.

Acceptance of Services

The services rendered as a result of an award from this solicitation shall not be deemed complete, until accepted by the Town and shall be in compliance with the terms herein, fully in accord with the specifications and of the highest quality. In the event that the service does not conform to the specifications, the Town reserves the right to terminate the contract and will not be responsible to pay for any such service.

Local Preference

The Local Vendor Preference program has been implemented by the Town of Bluffton under the Town of Bluffton Ordinance No. 2010-13. The ordinance allows the Town to implement more favorable evaluation criteria for vendors

that are certified as local vendors. Any vendor certified as a local vendor shall be given preference in the following manner:

A. Definition of a Certified Local Vendor:

- Company maintains a local office within the legally defined boundaries of Beaufort County; has a majority of full time employees, chief officers and managers regularly conducting work at this location; properly licensed for commercial operations; is open to the public; and is in compliance with local zoning requirements;
- Company has held a valid Town Business License for a consecutive period of at least two (2) years prior to application for certification; and
- Company has submitted a Local Preference Certification statement and is on file.

B. Evaluation Processes:

- Selection criteria shall include (if applicable) the local vendor preference program or demonstrated local content with a minimum weighting of five (5) percent.

4. SUBMITTALS and FORMAT

By submitting a statement of qualifications, the firm certifies that it has full knowledge of the scope, nature, and quality of work to be performed. Submittals should be prepared simply and economically, providing a straightforward, concise description of the respondent's ability to fulfill the requirements of the scope of work.

The Town reserves the right to award a contract pursuant to this RFQu without further discussion with Respondents. Therefore, it is important that each submittal is complete, adheres to the format and instructions contained herein, and is submitted in the most favorable manner possible. Failure to provide the requested information will render your proposal as non-responsive.

Due to the current state of pandemic emergency, packages shall be **PDF submitted electronically through the Vendor Registry portal**. Click the large red SUBMIT BID tab to upload the RFQu response.

The contents of the proposal shall include the following:

A. **Signatory Sheet**

Attached.

B. **Letter of Transmittal**

Limit to one (1) or two (2) printed pages.

- Briefly state the firms understanding of the work to be done and the commitment to perform the work.
- Give the names of the persons who will be authorized to make representations for the firm, their titles, and contact information. Identify the person who will be the overall project manager and the Town's primary point of contact.

- The letter must be signed by an authorized representative of the company who has the authority to commit the company to their proposal as submitted.

C. Firm's Past Performance

- A minimum of five (5) references from similar projects which were completed in the last five (5) to seven (7) years, including each client's project manager, with telephone number and e-mail address. Include a description of the project objectives and size, scope of work, dates, contract amounts, and lessons learned. Three references must be regarding projects by the prime consultant and two references may be regarding projects by sub-consultants.
- Provide a list of litigation history of the firm for the past five (5) years.

D. Project Team Profile

- The Town anticipates selecting a qualified consulting team that includes the broadest mix of experts in urban planning, market analysis, economic development programs and incentives, housing, urban design, landscaping, transportation, historic preservation, and land use. It is essential that the consultant also be able to demonstrate a proven ability to implement public input processes that ensure any final product has received adequate input and has been developed through collaboration with Town officials and staff, stakeholders and the general public. Include credentials of subcontractors, if any.
- Résumés of all primary staff members and subcontractors working under this contract must be provided along with an organizational chart (including sub-consultants). A Principal in Charge or Project Manager with at least ten (10) years of experience on similar projects and who has professional planning credentials, at least one recognized professional certification (e.g., AICP, P.E. AIA), must be identified as part of the proposal.

The following MUST be included for each team member, including sub-consultants:

- Title
- Roles and responsibilities on this project
- Education / degree(s)
- Experience (include years with current firm)
- Professional registrations and certifications, listing applicable state(s)
- Office location
- Role in past projects of this type
- Hourly billing rate on this project
- Provide a description of available backup personnel and their office location as well as project specific resources your firm would employ to accomplish the given objectives of the project.

E. Project Approach -- *submit for Comprehensive Plan Update solicitation only*

- **Work Plan:** Describe in detail the strategy your firm would employ to accomplish the given objectives of the project including the approach for working with clients to arrive at the most creative, aesthetically successful, cost effective, and structurally sound design concept while working within established Town parameters. Explain the roles of the team members, procedures and methodologies to be used and any other relevant information regarding the actual work. Address any unique challenges or opportunities this project and project site offers to meet the objectives of the project and the facilities the Town requires.

- **Schedule and Workload Projections:** Present an anticipated workload of project team (please show in tabular format with each team member's anticipated obligations depicted over the life of the project). Although a full scope may not be defined at this point, endeavor to develop a generic, task-based schedule for the work. This may be based on unit rates of anticipated progress.

F. Fees

- Please use the attached pricing sheet. Include proposed subcontractors, if any.

5. EVALUATION, SELECTION, NEGOTIATION and AWARD

The Town of Bluffton procurement code will be followed to secure the awarded firm. The contact listed within this solicitation, in coordination with the Purchasing Administrator, will be the coordinator for the selection process and the sole point of contact for all respondents. In addition to the materials provided in the written responses to this RFQu, the Town may utilize site visits or may request additional material, information, interviews, presentations or references from the respondent(s) submitting qualification packages.

A. Evaluation Criteria

It is anticipated that two (2) or three (3) consultant teams will be selected to move through the selection process. A points system will be given to each criterion listed through the identified weighting system:

EVALUATION CRITERIA	MAX POINTS
Past Performance	30
Team Profile	30
Project Approach	30
Fee Schedule	5
Local Vendor Preference	5
TOTAL POSSIBLE POINTS	100

B. Evaluation Method

All responsive submittals will be reviewed and evaluated by a Review and Selection Team. This three (3) to five (5) member committee approach will require selected staff to evaluate the submittals through the following processes:

- Individually provide a detailed review and thorough evaluation of each submittal;
- Individually score each submittal utilizing the scoring method given;
- Combining the scores of each individual team member to form an overall team score;
- Eventual participation in a team discussion, including in-depth evaluations and group interaction after individual review and scores are achieved.

The Town reserves the right to request additional information and/or clarification of any information submitted by any respondent at any time during the evaluation process. This includes but is not limited to information that indicates financial resources as well as the ability to provide and maintain the services as requested. The Town reserves the right to make investigations of the qualifications of the respondent as it deems appropriate, including but not limited to background investigations.

C. Selection Method

The Review and Selection Team will request the Purchasing Administrator to schedule the top-ranked firms for presentations / interviews, either in-person or virtual.

The Town may choose to conduct oral interviews with, or receive oral presentations from, one or more of the Respondents. The Town will not be liable for any costs incurred by a Respondent in connection with such interviews/presentations (i.e., travel, accommodations, etc.)

The Selection and Review team will rank all complete submittals received and/or formal oral presentations /interviews in order of preference and outcomes will be based on the determination of which firm will meet the highest qualifications as it pertains to the requirements of the scope of work.

D. Negotiations

The Town reserves the right to negotiate a final agreement with the top ranked proposal that meets the needs of the Town of Bluffton. If a contract cannot be negotiated with the highest-ranking firm, negotiations may be conducted with the second, and then the third, and so on until a satisfactory contract can be agreed upon and executed.

E. Award and Contract

Award will be made in accordance with the Town of Bluffton's purchasing policy and procedures. A contract resulting from an award shall be the Town of Bluffton's purchase order and/or contract, containing the Town's terms and conditions. A sample of the contract has been attached to this solicitation for viewing. Contracts from firms submitting a proposal will not be accepted.

Attachments

1. Signatory Sheet
2. Price Sheet
3. Sample Town of Bluffton Agreement
4. Town of Bluffton Comprehensive Plan - Amended 2014
5. Town of Bluffton Strategic Plan FY 2021-2022
6. Town of Bluffton Old Town Master Plan
7. Town of Bluffton Unified Development Ordinance
8. Southern Beaufort County Regional Plan



TOWN OF BLUFFTON

SOLICITATION NO: 2021-20
ISSUED BY: Felicia Roth
EMAIL: froth@townofbluffton.com

SUBMITTAL PACKAGES DUE:

CLOSING DATE: Thursday, November 12, 2020

CLOSING TIME: 2:00 p.m.

FAX / E-Mail not accepted

PROJECT TITLE & DESCRIPTION: RFQu for Comprehensive Plan Update and Planning Services

ACKNOWLEDGEMENT OF ADDENDA: This bid is submitted subject to Addenda numbers ____ through ____.

THIS FORM MUST BE SIGNED TO BE CONSIDERED FOR AWARD

COMPANY NAME:

DATE:

MAILING ADDRESS:

PHONE:

FAX:

CITY:

STATE:

ZIP:

SSN OR FEDERAL TAX NO:

TITLE OF AUTHORIZED REPRESENTATIVE:

E-MAIL:

WEB URL:

AUTHORIZED SIGNATURE:

PRINTED NAME:

By my signature I certify that this response is made without prior understanding, agreement, or connection with any corporation, firm, business entity, or person submitting a response to this solicitation for the services to be provided, and is in all respects true, accurate and without collusion or fraud. I certify that pricing submitted is valid for 90 days from the date of submittal.