

# **REQUEST FOR QUALIFICATIONS**

**FOR**

## **URBAN DESIGN AND MASTER PLANNING**

**City of Easley  
205 North First Street  
Easley, SC 29640**

**Issue Date:  
Friday, June 7, 2019**

**Proposals Due:  
Friday, July 19, 2019 at 2:00pm**

**For Information Contact:**

**Blake Sanders, PLA  
bsanders@cityofeasley.com**

## SECTION I – PROJECT DESCRIPTION AND OVERVIEW

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The City of Easley (CITY) is seeking to develop an economic development strategy and master plan for selected properties within the City of Easley. The Strategy and Master Plan will promote an increased tax base, private investment and job creation through mixed-use, high-tech industrial, corporate offices, retail, commercial, high density housing, and single-family housing.

The City is seeking respondents with an understanding of similar development patterns in similar sized municipalities and counties that are located in similar economic regions. The ideal respondent can translate their understanding into a vision that is in context with our size, being mindful of different types of mixed-use development. Respondents should evidence their ability to incorporate site design, site planning and urban design into a plan and recruitment efforts. The selected service will work at the direction of the City of Easley, in conjunction with Pickens County and Easley Combined Utilities. A key aspect of the strategy should incorporate industrial and commercial space planning and market research to determine the needs of the site in its entirety prior to stakeholder meetings and master planning.

It is anticipated that the Consultant selected will demonstrate expertise and experience in the following areas:

- Planning and urban design, landscape architecture, architecture and master planning;
- Civil and Site Engineering
- Economic feasibility and market demand analysis;
- Stakeholder Facilitation

Individuals, firms, and multi-disciplinary teams with expertise and experience are encouraged to apply.

### **B. RFQ RESPONSES**

All responses to this RFQ must be submitted (one original copy, four hard copies, and an electronic copy) and received by the City of Easley by **Friday, July 19, 2019 at 2:00 pm**. Late SOQ/proposals will not be accepted. Please direct all questions and SOQ/proposals to:

Blake Sanders, PLA  
City of Easley Planning  
205 North First Street  
Easley, SC 29640

phone: (864) 855-7900  
email: [bsanders@cityofeasley.com](mailto:bsanders@cityofeasley.com)

The City will evaluate the responses to this RFQ based on the criteria outlined in the Scope of Work and Requirements and Information.

## SECTION II – SCOPE OF WORK

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### SCOPE OF WORK

Consultants should respond to this RFQ with a statement of qualifications for all of the following services. The following descriptions identify the minimum scope of services that may be provided by a qualified consultant. Specific details of the Scope of Work will be identified after the selection of Consultant.

#### **1. PLANNING, URBAN DESIGN, LANDSCAPE ARCHITECTURE, ARCHITECTURE AND/OR PROJECT MANAGEMENT SERVICES**

The Department is seeking support in land use planning, master planning, urban design, programming and conceptual design.

- Complete urban design and planning services;
- Defining a work plan, schedule, and project management approach;
- Coordinating project effort with City of Easley, Easley Combined Utilities, Pickens County, Department of Transportation (DOT), and other City, County, Regional, State or Federal agencies;
- Initial assessment and inventory of applicable physical, social and environmental elements and current conditions;
- Research and inventory existing conditions and urban design characteristics including but not limited to analysis of existing character of streets within study area(s), including assessment of walkability, bike facilities, transportation connections, open space, existing and planned street dimensions, roadway, utilities, drainage, storm water management, built and historic structures;
- Research and inventory existing conditions and urban design characteristics, especially as they relate to existing and planned zoning, transportation, infrastructure, street design, and neighborhood character;
- Map production of existing conditions, infrastructure, etc. within study areas;
- Planning and project feasibility studies for urban design strategies, transit neighborhoods, sustainability methods, healthy communities, new development typologies, and infrastructure analysis;
- Analyzing and evaluating existing planning, transportation and traffic studies and identifying opportunities for pedestrian and community enhancements;
- Development of preliminary land use concepts, policies, and implementation strategies, including zoning ordinances, development standards and design guidelines;

- Identification and evaluation of priority community benefits;
- Assistance in communicating planning concepts to stakeholders, including preparing conceptual design/massing alternatives, renderings and photo-simulations, site plans, maps, 3-D models, illustrations and diagrams for use as visualization tools during adoption phases of the project;
- Preparing street cross-section designs and draft design guidelines for adjacent development sites, for implementation through community plans, design overlays, streetscape plans, new street standards or other strategies;
- Conceptual and final master plans that may/will include: industrial, office, retail, commercial, mixed-use, public spaces, high-density residential, single family residential;
- Strategic project direction, project management and coordination of consultant team;
- Other related, allied, incidental and supplementary services as needed to complete the work on awarded project.

## **2. ECONOMIC ANALYSIS SERVICES**

Economic Analysis Services are required to assist City Staff with accurate market data that can help in the development of realistic and effective plans, policies, and regulations. The City will need to determine economic development priorities and further expand on place-based development strategies. Information about market forces will be used to test and shape potential development scenarios so that development parameters are in line with desired outcomes. Planning efforts may also include implementation measures focusing on funding opportunities that need to be identified. Economic Analysis Services may include, but not limited to:

- Estimating the market potential for various types of industrial, commercial, and housing sectors, and identifying market gaps. Market demand studies should concentrate on the types of businesses that have the greatest potential for growth and sustainability;
- Creating customized market analyses to assist the City in making informed recommendations;
- Recommendations for developing housing at various affordability levels either as stand-alone projects or within mixed-use projects;
- Feasibility analysis scenarios for specific projects with community benefits, as needed;

- Data analysis to support planning efforts presented in graphic formats such as maps and easy-to-understand diagrams and illustrations. Data should be structured in such a way as to feed into the City's geographic information systems (GIS);
- Evaluating opportunities for joint development (e.g. public/private partnerships);

### **3. PUBLIC OUTREACH SERVICES**

Outreach services are needed in order to assist City Staff in gathering and summarizing stakeholder input as part of the planning process. Outreach services may include, but are not limited to;

- Developing an outreach strategy with the City to achieve buy-in from stakeholders;
- Coordinating initial outreach to identify issues, concerns, and opportunities;
- Conducting stakeholder interviews, steering and advisory committees, etc.;

### **4. DELIVERABLES FORMAT**

Product deliverables are to be provided in paper copy as well as in electronic format as follows:

- a) All spatial and spatial attribute data in ESRI ArcGIS compatible format
- b) All analytical data in Microsoft Office Excel or Access format
- c) All text and text tables in Microsoft Word format
- d) All charts, illustrations or graphic images in Graphic Interchange format (.gif). Joint Photographic Experts Group (.jpeg) and Portable Document Format (pdf) format
- e) All final documents in bookmark enabled Portable Document Format (pdf) format.

Specific deliverables will be identified after the selection of a Consultant. All qualified consultant's work products are expected to meet the requirements of existing state law and any changes to those laws while under contract. It is anticipated that the scope of services above will be completed within 4-6 months. The anticipated budget for the project is not to exceed \$75,000, inclusive of all reimbursables, travel, printing, etc.

## SECTION III – STATEMENT OF QUALIFICATIONS (SOQ) CONTENTS, PROVISIONS AND REQUIREMENTS

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### A. PROPOSAL FORMAT, CONTENTS AND EVALUATION CRITERIA

The RFQ has been structured to provide specific requirements which function as a standardized framework for the evaluation of prospective Proposer's qualifications.

It is the Proposer's responsibility to prepare a SOQ, which is representative of the Proposer's qualifications. If there is any additional information which would assist the CITY in its assessment of the SOQ, the Proposer should include all such information in its SOQ under the title Additional Information.

Each SOQ/proposal shall be prepared simply and economically, avoiding the use of elaborate promotional material beyond what is sufficient to provide a complete and accurate presentation. The responses to this RFQ must be made in accordance with the format set forth in this Section. Only SOQs that have been determined to be responsive will be considered. Failure to adhere to the following format may cause rejection of the SOQ as non-responsive.

#### 1. Cover Letter

The SOQ shall contain a cover letter and introduction (limited to one page) which includes the company name and address, the name and telephone number of the persons who will be authorized to represent the Proposer regarding all matters related to the SOQ/proposal and any contract subsequently awarded to the Proposer. This letter shall be signed by any person(s) authorized to bind the company to all commitments made in the SOQ.

#### 2. Addendum Acknowledgement:

The SOQ shall contain an acknowledgement of receipt of all amendments and/or addenda to the RFQ.

#### 3. Introduction:

Brief summary of the Proposer's understanding of SOQ objectives and Scope of Work.

#### 4. Qualifications of Proposer:

The Proposer's team should possess qualifications and previous experience performing the Scope of Work as described in this RFQ.

Proposers shall also provide thorough responses to the following list of questions.

The response to these questions will be included in the City's evaluation of the Proposer. In addition, the responses to these questions will be incorporated into and made a part of the contract. In your SOQ, please restate the questions followed by the response.

- a. What is the general type of work performed by your firm/team? Does your firm/team have a focus? If yes, please elaborate.
- b. What is your firm's experience in Planning and Urban Design, Economic Analysis, and Outreach services which are similar to those requested in this RFQ, including development of land use plans and urban design standards, market, etc.?
- c. What is your firm's experience working with the City of Easley?
- d. What is your firm's experience in preparing urban design strategies, creating mixed-use neighborhoods, industrial parks, and research centers, sustainability methods, healthy communities, new development typologies, creative and cultural arts districts, master plans, etc.?
- e. Is your firm located in the Upstate South Carolina area? If your firm is located outside of Upstate South Carolina, what will be done to ensure access?
- f. What are your firm's quality assurance measures for this type of contract work?
- g. Provide any additional information regarding your firm to assist the City to better evaluate your firm.

## **5. Qualifications of Proposer Staff**

This section includes, but is not limited to, a listing of all required personnel and qualifications for each position. A Project Manager must be designated and identified, and a detailed resume must be submitted; resumes of other key personnel should be provided. An organizational chart of management personnel shall also be included in this section.

The Proposer's organization will be evaluated based upon the capability of the Proposer to meet the terms of the RFQ, such as the ability to accomplish the work within the estimated time frame, plus the related studies or projects recently completed by the Proposer's organization, which demonstrates expertise in accomplishing similar work. The qualifications of proposed staff will be evaluated in terms of their previous experience and capabilities. The relevant experience of key personnel, especially the Project Manager, will be of major importance in the evaluation of the SOQs. Proposers shall provide thorough answers to the following list of questions. In the SOQ, each question should be restated followed by the response.

- a. Who will be the responsible Principal for the project? What is this person's background, experience, etc. within the firm? Include a resume of this person.
- b. What is the commitment of Principal / Sr. Staff to this project?

- c. Who will be the Project Manager(s)? Describe the background, experience, and availability. Attach a resume for each staff.
- d. Identify other professional staff working on this SOQ.
- e. Will there be Sub-Consultants? If so, provide a list the Sub-Consultants.
  - i. What aspect of the project will they work on and what are their qualifications?
  - ii. What is your firm's previous experience working with the proposed Sub-Contractor(s)?
- f. Provide an organization chart which identifies the Project Principal, Project Manager(s), key staff and other personnel, sub-consultants, etc. to include their roles and responsibilities.

**6. Fee Schedule**

Provide hourly billing rates for team members according to their roles and responsibilities.

**7. References**

Name, title, address, telephone number and Email address of three (3) former or current clients who have, within the last five years, contracted with the Proposer for services similar to those described in this RFQ. Provide references for completed projects which represent the range of tasks required under this RFQ. Include project name, brief description, contact name, address, phone number and email information.

**8. Work Samples:**

Include at least three completed projects completed within the last five years that demonstrates experience with projects similar in scope to the work described in this RFQ. This may illustrate: knowledge of planning issues, urban design, implementation programs, industrial/commercial/mixed-use master planning, adopted plans, economic analysis. Provide descriptions of work on similar projects, including but not limited to: project descriptions, dollar amounts, timelines, and services provided. Describe how it was produced (programs, production process) and approximate budget.

**9. Additional Data:**

Include any other data the Proposer considers essential to the evaluation of the SOQ.

**10. Addendum Acknowledgment**

The SOQ/proposal shall contain an acknowledgment of receipt of all amendments and/or addenda to the RFQ.

## 11. Evaluation Criteria

Evaluation of the SOQ/proposals will be weighted as follows:

### 40% **Qualifications of the Firm**

- Company's background and experience in the field;
- Company's experience with projects of similar size and scope;
- Company's experience working with large jurisdictions and implementation;
- Company's capability to reallocate resources effectively as needed to meet project schedule and needs.

### 40% **Qualifications of the Staff Members**

- Project manager(s) and key staff members' background and experience;
- Subcontractor's (if any) background and experience;
- Project manager(s)' communications with City Staff

### 10% **Cost Effectiveness (A8)**

- Hourly billing rates for team members for services to be performed;

### 10% **References**

- Similar projects completed on time and within budget;
- History of effective communication with clients;
- Client Satisfaction.

Proposers may be invited to an interview with the Evaluation Committee and should be prepared to have key management personnel available for these interviews. The successful Proposer(s) will be named after the SOQs are evaluated. The Evaluation Committee will make recommendations to the City of Easley Council. If interviews are not held, final selection will be based solely on the RFQ submittal.

It is the Proposer's responsibility to prepare a SOQ, which is representative of the Proposer's qualifications. If there is any additional information which would assist the City in its assessment of the SOQ, the Proposer should include all such information in its SOQ under the title Additional Information.

## **B. LIMITATIONS**

1. Notwithstanding any other provisions of this RFQ, the City reserves the right to reject all SOQ/proposals and to waive any submission or task contained within a SOQ/proposal, if doing so would be to the advantage to the City or its taxpayers.
2. The Proposer understands and agrees that the City shall have no financial responsibility for any costs incurred by the Proposer in responding to this RFQ.
3. The City of Easley requires that every SOQ, proposal, bid, or offer shall have thereon or attached thereto the affidavit of the Proposer indicating that: such SOQ/proposal is genuine, not sham or collusive, nor made in the interest of any person therein named; that the Proposer has not directly or indirectly induced or solicited any other Proposer to submit a sham SOQ/proposal or to refrain from proposing; and that the

Proposer has not in any manner sought by collusion to secure for himself an advantage over any other Proposer. Any proposal/SOQ made without such affidavit, or found to be in violation thereof, shall not be considered.

## **C. SUBMISSION OF SOQ/PROPOSAL**

### **1. Acceptance of Terms and Conditions**

Submission of a SOQ/proposal pursuant to this RFQ shall constitute acknowledgment and acceptance of all the terms and conditions hereinafter set forth in this RFQ unless otherwise expressly stated in the SOQ/proposal.

### **2. Award of Contract**

The Proposer(s) to whom a contract is awarded shall be required to enter into a written contract with the City of Easley in a form approved by the City Attorney. This RFQ and the proposal/SOQ, or any part thereof, may be incorporated into and made a part of the final contract, however, the City reserves the right to further negotiate the terms and conditions of the contract with the selected Proposer.

### **3. Conferences During the SOQ/proposal Period**

After expiration of the time to submit SOQ/proposals and continuing until a contract has been awarded, all City personnel and all others involved in the project will have been specifically directed against holding any meetings, conferences or technical discussions with any Proposer except as provided in this Section. Proposers shall not communicate in any manner with any representatives of participating agencies regarding the RFQ or the SOQ/proposals during this period of time, unless authorized, in writing, by the City. Failure to comply with this requirement may result in the termination of further consideration of that Proposer's SOQ/proposal.

### **4. Adherence to RFQ Format**

The response to this RFQ must be made in accordance with the format set forth in this Section. Failure to adhere to this format may be cause for rejection of the SOQ/proposal as non-responsive.

### **5. SOQ/Proposals Conditions and Limitations**

SOQ/Proposals which set forth conditions or limitations to those set forth in the RFQ may be considered non-responsive and rejected.

### **6. SOQ/Proposal Interpretation and Addenda**

Any change to or interpretation of the RFQ will be sent by the City to each firm or individual that requests such changes. Receipt of any such changes or interpretations shall become a part of said RFQ and may be incorporated into any contract awarded.

### **7. Execution of SOQs/Proposals**

If the Proposer is a partnership, the proposal/SOQ must be signed in the name of the partnership by a general partner thereof. If the Proposer is a corporation, the proposal/SOQ must be signed on behalf of the corporation by two authorized officers (a chairman of the Board, President or Vice-President and a secretary, treasurer or chief financial officer) or an officer authorized by the Board of Directors to execute

such documents on behalf of the corporation. All signatures above must be original and in ink on at least one copy of the SOQ/proposal.

#### **8. Disposition of SOQs/Proposals**

All SOQs/proposals submitted in response to this RFQ will become the property of the City of Easley and a matter of public record. The Proposer must identify, in writing, all copyrighted material, trade secrets or other proprietary information that it claims is exempt from disclosure under the Public Record Act. Any Proposer claiming such an exemption must also state in the SOQ/proposal its refusal to disclose such material, trade secrets or other proprietary information to any party making a request. Any Proposer who fails to include such a statement shall be deemed to have waived its right to an exemption from disclosure as provided by said Act.

#### **9. SOQ/Proposal Cost and Ownership**

Each SOQ/proposal prepared in response to this RFQ shall be prepared at the sole cost and expense of the Proposer and with the expressed understanding that no claims against the City for reimbursement will be accepted. All SOQs/proposals will become the property of the City and will not be returned to the Proposer. The Proposer should not include confidential information or trade secrets without expressly stating and identifying the information or trade secrets to be considered confidential, since all accepted SOQ/proposals will become public information. However, if such information is necessary to assure a competitive SOQ/proposal, then the Proposer is to follow the guidelines for confidential information as discussed below.

#### **10. Confidential Information**

SOQs/Proposals made in response to this RFQ may contain technical, financial, or other data whose public disclosures could cause substantial injury to the Proposer's competitive position or constitute a trade secret. To protect such data from disclosure, the Proposer should specifically identify the pages of the SOQ/proposal that contain confidential information by properly marking the applicable pages and inserting the following notice in front of the SOQ/proposal:

***"NOTICE"***

*"The data on the pages of this SOQ/proposal identified by an asterisk (\*) or marked along the margin with a vertical line, contain information which are trade secrets and/or whose disclosure would cause substantial injury to the Proposer's competitive position. The Proposer requests that such data be used only for the evaluation of its SOQ/proposal, but understand that disclosure will be limited to the extent that the City determines is under federal, state, and local law."*

In SOQs/proposals containing proprietary information, proprietary paragraphs and/or data should be clearly marked as noted above. The Proposer must include one additional unbound copy of the SOQ/proposal with the confidential material totally blacked out or removed from the text so that one copy is available as public material. In accordance with Public Records Act, this information may, upon request, be released to the public.

The City assumes no responsibility for disclosure or use of unmarked data for any purpose. In the event properly marked data are requested, the Proposer will be advised of the request and may expeditiously submit to the CITY a detailed statement indicating the reasons it has for believing that the information is exempt from disclosure under federal, state, and local law. This statement will be used by the City in making its determination as to whether or not disclosure is proper under federal, State, and local law. The City will exercise care in applying this confidentiality standard but will not be held liable for any damage or injury that may result from any disclosure that may occur. The Proposer agrees to assume and pay for all costs incurred by the City, including attorneys' fees awarded by the court, if the Proposer requests the City to resist disclosure of material provided to the City by the Proposer.

#### **11. Public Records**

All SOQ/proposals submitted in response to the RFQ shall become a matter of public record and the property of the City.

#### **12. Insurance Requirements**

The Proposer will be required to maintain insurance in effect during the term of the contract as set forth in Appendix II of this RFQ.

#### **13. Rights Reserved by the City**

The City reserves the right, at its discretion, to pursue any or all of the following actions in regard to this RFQ:

- Award contracts based upon the evaluation criteria contained in this RFQ;
- Request additional information and/or clarification from the Proposers;
- Reject any or all SOQ/proposals, permit the timely correction of errors, or waive minor deviations;
- Withdraw this RFQ or extend the time for submittal;
- Shortlist any or all SOQ/proposals and schedule presentations by the Proposers;
- Take whatever other action it deems in its interest;
- Restrict the review or distribution of all SOQ/proposals until a contract is awarded;
- Terminate the contract upon a 30-day notice.

The City may consider SOQ/proposals that contain provisions which deviate slightly from the requirements in this RFQ, if the deviation(s) are not considered material. However, if the originator of such a SOQ/proposal is awarded the contract, the Proposer will be expected to perform in full compliance with the objectives described herein. This RFQ does not obligate the City to accept any SOQ/proposal, negotiate with any Proposer, nor award a contract in response to this RFQ.

#### **14. Preparation of SOQ/proposal**

Each SOQ/proposal will be bound, not stapled, with pages numbered sequentially and be prepared simply and economically avoiding the use of elaborate promotional materials beyond those sufficient to provide a complete, accurate and reliable presentation. Submittal of non-relevant or promotional material will result in a lower score for the evaluation of the Project.

**15. Single SOQ/proposal Response**

If only one SOQ/proposal is received in response to this RFQ, and it is found by the City to be acceptable, a detailed price/cost SOQ/proposal may be requested of the single Proposer.