



Morrisville

Live connected. Live well.

REQUEST FOR QUALIFICATIONS
for a
TOWN OF MORRISVILLE AFFORDABLE HOUSING PLAN

DATE ISSUED
January 28, 2019

DUE DATE
February 19, 2019
3:00 p.m.

E-Mail Address Submittal (Preferred)
rfq@townofmorrisville.org

Physical Acceptance Location
Town of Morrisville Town Hall
Attn: Shannon Fonville,
Purchasing and Contracts Manager
100 Town Hall Drive
Morrisville, NC 27560

Mailing Address
Town of Morrisville
Attn: Shannon Fonville,
Purchasing and Contracts Manager
100 Town Hall Drive
Morrisville, NC 27560

TABLE OF CONTENTS

I. General Information..... 3

II. Background 3

III. Scope of Services 4

IV. Content and Format of Proposal Package5

V. Submittal Process Details7

VI. Questions and Clarifications.....7

VII. Statement of Qualifications Submittal7

VIII. Anticipated Schedule 8

IX. Selection Process..... 8

X. Evaluation Criteria 8

APPENDIX A 9

Notice

The Town of Morrisville (as referred to as “the Town”) is soliciting Statement of Qualifications from firm(s) or organization(s) qualified to provide professional services in its efforts to prepare a Housing Needs Assessment and develop Affordable Housing Implementation Policies. The project will result in a comprehensive Affordable Housing Plan that identifies Morrisville-specific strategies that result in increasing affordable housing opportunities for anyone desiring to live in Morrisville.

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

I. General Information

The Town is a rapidly growing community at the heart of North Carolina’s Research Triangle, one of the fastest growing regions in the country. In the past few decades, Morrisville has transformed from a small, rural town into a diverse residential community with a July 2018 population estimated at 28,599 residents. Further, Morrisville’s regional location and proximity to Research Triangle Park have supported major investment and an expanding employment base.

Housing prices in the Town have continued to rise with the Median Listing Price for a single-family home in October 2018 reaching more than \$359,000. In addition, rental rates continue to rise with an average rent during that same period of \$1,269, per month, which is an 8.18% increase from last year, according to rentjungle.com. As the cost of housing continues to rise, individuals living and working in Morrisville are faced with the issue of increasingly more limited access and availability to affordable housing.

II. Background

Morrisville is located in Wake County, which has an adopted Affordable Housing Plan. This Plan articulated the need for affordable housing on a Countywide basis due to: (a) rapid population growth generating upward pressure on the cost of housing; (b) household income increases lagging behind the rate of increasing housing costs; (c) affordable housing development not keeping pace with demand or need; (d) the loss of naturally occurring and subsidized affordable housing developments; and (e) current unmet housing needs that are likely to expand over time. While Morrisville does not mirror Wake County in terms of race and median household income, the Town faces the same competitive housing and rental market that makes affordable housing options difficult to find. The Wake County Affordable Housing Plan can be viewed at: <http://www.wakegov.com/humanservices/housing/Pages/Housing-Plan.aspx>.

Town Documents:

The Town adopted the McCrimmon Transit Small Area Plan in June 2013. Providing workforce housing is one of the four project goals identified in the Plan. The McCrimmon Transit Small Area Plan is available at: <https://user-cjghrlw.cld.bz/McCrimmon-Transit-Small-Area-Plan-2013>.

In 2017, the Town conducted a National Citizens Survey of residents through the National Research Center; the report found that Town residents were less likely to be under housing cost stress to those communities in comparison. (The results are available on the Town’s website at: <https://www.townofmorrisville.org/residents/national-citizen-survey>.) Yet, 14.2% of the

households in Town have income up to \$34,999¹, and 24.3% of primary jobs in Morrisville pay between \$15,000 and \$40,000 a year².

The Connect Morrisville Strategic Plan, adopted in 2018, defines intermediate and long-term goals, objectives and outcome measures that will help Town Council and staff focus on development and quality of life efforts. The addition of affordable housing units in Morrisville supports “Goal 2: Thriving and Livable Neighborhoods” by contributing to the well-being of the elderly and children, and “Goal 6: Economic Prosperity” by attracting and retaining employees. More information about the Strategic Plan is available at: <http://www.townofmorrisville.org/StrategicPlan>.

The Town is also currently updating the 2009 Land Use Plan. During the initial outreach process, the consultant provided both in person and online opportunities for community input. The affordability of housing within Morrisville was an important point of discussion emphasized by residents and other stakeholders. Many individuals expressed some concern that housing in Morrisville does not offer more options to the existing workforce. A copy of the Morrisville Land Use Plan Update Trends & Influences Summary Memorandum is available online at: <http://www.hlplanning.com/portals/morrisville/documents/>.

III. Scope of Services

The Town of Morrisville Affordable Housing Plan should include the following information and analysis. Alternative services and deliverables may be proposed on evidence of the need to meet the purpose of the RFQ. RFQs that do not include all these will not be considered.

Task 1: Timeline:

- Provide an estimated timeline and work schedule. The timeline must be efficient and move briskly.

Task 2: Stakeholder Feedback:

- Review and utilize recent community input provided as part of the Land Use Plan.
- Gather feedback from stakeholders providing services to vulnerable populations in the Town.
- Engage and receive feedback from the Town Council and Planning and Zoning Board.

Task 3: Housing Needs Assessment:

- Identify the people of Morrisville (e.g., demographics, race and ethnicity, and economics) now and in the future.
- Identify the housing in Morrisville (e.g., housing stock and occupancy, housing market, and housing costs and affordability) now and in the future.
- Identify vulnerable populations in Morrisville (e.g., veterans, people with disabilities, older adults).
- Identify barriers that affect housing affordability and/or the development of new affordable housing units.
- Provide in depth analysis of affordable housing needs now and in the future for each of the populations noted in the bullets above.

¹ U.S. Census Bureau. American Community Survey. 2012-2016 5-year average.

² Source: U.S. Census Bureau. 2017. LEHD Origin-Destination Employment Statistics (2002-2015) accessed on February 9, 2018 at <https://onthemap.ces.census.gov>. LODES 7.3 [version 6]

- Present analysis and findings to community stakeholders, including Town Council and the Planning and Zoning Board.
- Make data gathered available for community outreach purposes.

Task 4: Morrisville-Specific Recommendations:

- Identify regulatory implementation policies and strategies that address housing gaps identified in the Housing Needs Assessment. Any recommended regulatory policy or strategies must be consistent with the framework set forth by the North Carolina General Assembly.
- Identify non-regulatory implementation policies and strategies that address housing gaps identified in the Housing Needs Assessment.
- Include both traditional and non-traditional funding opportunities and partnerships that support recommendations in this task.
- Include both rental and ownership opportunity recommendations.
- Include relevant linkages to the Wake County Affordable House Plan.

Each task shall be combined and form the basis for a comprehensive report, titled “Town of Morrisville Affordable Housing Plan,” that clearly defines the Plan’s horizon and policy implementation timelines (e.g., 5 year, 7 year, etc.). The Plan will be subjected to a two- or three-stage review process. Town staff will review the draft and advise the consultant of needed changes – this stage may consist of up to three review cycles. When the changes have been finalized, the consultant will be advised to produce a draft for presentation to Town Council and the Planning and Zoning Board. This stage can be converted to a two-stage process. Following the presentation, up to two additional review cycles may be necessary to incorporate any recommended changes.

Media and file formats: Reports shall be delivered to the Town in a current version of Microsoft Word and figures shall be delivered to the Town in their native format(s). Reports distributed to stakeholders or placed on the internet for public access will be in Adobe PDF format. Presentations shall be produced and delivered in Microsoft PowerPoint and public versions will be delivered in Adobe PDF format. Images and figures used for public outreach shall be produced by the consultant.

Reports are to be dated and identified as either draft or adopted, as appropriate. Submittal of final reports shall be accompanied by the files, in their native format, that were used to generate graphics displayed in the reports.

IV. Content and Format of Proposal Package

Firms submitting qualifications shall have no association with elected or appointed officials that could be considered a conflict of interest. Any such relationship will subject the firm to immediate disqualification in consideration for this project. A selection committee will evaluate the submittals and may elect to select the most qualified firm based on the responses as submitted, or elect to conduct interviews with multiple firms prior to recommending a firm.

The submission shall be a maximum 25 pages front and back or 50 pages single-sided. Only digital Work Samples will be accepted. Submittals shall include the following:

Letter of Interest:

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

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

Firm and Staff Qualifications:

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

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

Project Approach:

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

Anticipated Schedule:

The submission shall demonstrate how the submitting firm will manage its responsibilities and work scheduled to be performed, including work of and with Town personnel.

Work Samples:

The submission shall include three recent work samples of affordable housing plans prepared for jurisdictions comparable to the Town in terms of existing housing needs and demographics.

V. Submittal Process Details

Firm selection will be based on the letter of interest, firm and staff qualifications, project approach, anticipated schedule, and work samples related to preparing affordable housing plans for compatible jurisdictions.

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

VI. Questions and Clarifications

All questions shall be submitted to Shannon Fonville, Purchasing and Contracts Manager, via email (rfq@townofmorrisville.org), no later than 1:00 p.m. on Wednesday, February 6, 2019. Questions submitted later than this deadline will not be considered. An addendum with questions and answers, if necessary, will be published on the Town website by 5:00 p.m. on Monday, February 11, 2019.

VII. Statement of Qualifications Submittal

The deadline for firms submitting qualifications is 3:00 p.m. on Tuesday, February 19, 2019. No submissions or supporting documents will be accepted after this deadline. Submittals may be emailed to RFQ@townofmorrisville.org or delivered to:

Physical Acceptance Location

Town of Morrisville Town Hall

Attn: Shannon Fonville, Purchasing and Contracts Manager

100 Town Hall Drive

Morrisville, NC 27560

Mailing Address

Town of Morrisville

Attn: Shannon Fonville, Purchasing and Contracts Manager

100 Town Hall Drive

Morrisville, NC 27560

Submittal packages should be enclosed in a sealed envelope marked **REQUEST FOR QUALIFICATIONS – MORRISVILLE AFFORDABLE HOUSING PLAN** to the attention of Shannon Fonville, Purchasing and Contracts Manager, in the Finance Department.

All proposal packages and materials submitted hereunder become the exclusive property of the Town of Morrisville.

VIII. Anticipated Schedule

- 02/19/2019: Submission deadline
- 02/25/2019 – 03/01/2019: Selection committee review of submittals
- 03/18/2019 – 03/22/2019: Interviews conducted with selected consultants, if necessary
- 03/29/2019: Highest ranked firm notified
- 04/18/2019: Contract finalized
- 05/01/2019: Project commences

IX. Selection Process

This RFQ provides information necessary to prepare and submit qualifications for consideration and ranking by the Town. It is the intent of the Town to appoint a selection committee to review the submitted Statements of Qualifications. This committee will review each qualification submittal and rank the submittal based on the criteria requirements specified within this RFQ. The Town may invite firms for interviews, but this is not a required step in the selection process. At the conclusion of the interviews (if held), the selection committee will rank the firms based on the selection criteria and the interviews. The Town will provide written notification to all firms regarding final selection by April 30, 2019.

Upon completion of the selection process, the highest ranked firm will be asked to submit a fee proposal to begin contract negotiations for a fair and reasonable price. By submitting its Statement of Qualifications in response to this RFQ, respondent accepts the evaluation process as outlined in the following section, acknowledges, and accepts that determination of the “most qualified” firm may require subjective judgments by the Town.

X. Evaluation Criteria

1. **Qualifications of the Firm:** Outline and specify the qualifications of the firm to provide the requested services as outlined in the scope of work. This shall include any sub-consultants that may be part of the team, if applicable. (25%)
2. **Overall Qualifications of the Project Manager and Project Team:** Clear identification of the project manager and team personnel that will be assigned to the project. This section shall include the demonstrated project management and quality control methods employed by the team. (25%)
3. **Project Approach and Project Understanding:** Preference shall be afforded to those firms that, in the opinion of the Town, will be able to adequately respond to requests for consultation meetings or project administration requirements, and firms having a detailed understanding of the project requirements. (35%)
4. **Relevant Experience.** (15%)

APPENDIX A

I. General Contract Terms and Conditions

- The selected firm will report directly to the Town of Morrisville. The selected firm is to administer the contract and to ensure that all work is performed in accordance with the contract requirements. The selected firm will be responsible for providing engineers, technicians, and sub-consultants with the appropriate skills and qualifications to ensure contract compliance. The firm will be directly responsible for oversight of the project for the Town.
- The selected firm will be notified by the Town and will enter into contract negotiations for receiving this work. A professional services agreement will be negotiated with the selected contractor based on the proposed scope of work outlined in their proposal. Appendix A is the Town’s standard professional services agreement that will serve as a basis for any contract with the selected firm/contractor.
- To the maximum extent allowed by law, the FIRM shall defend, indemnify, and save harmless the Town of Morrisville, its agents, officers, and employees, from and against all charges that arise in any manner from, in connection with, or out of the acts or omissions of the FIRM or subcontractors or anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable except for damage or injury caused solely by the negligence of the Town, its agents, officers, or employees. In performing its duties under this section, the FIRM shall at its sole expense defend the Town of Morrisville, its agents, officers, and employees with legal counsel reasonably acceptable to the Town. As used in this subsection – “Charges” means claims, judgments, costs, damages, losses, demands, liabilities, duties, obligations, fines, penalties, royalties, settlements, expenses, interest, reasonable attorney’s fees, and amounts for alleged violations of sedimentation pollution, erosion control, pollution, or other environmental laws, regulations, ordinances, rules, or orders. Nothing in this section shall affect any warranties in favor of the Town that are otherwise provided in or arise out of this contract. This section is in addition to and shall be construed separately from any other indemnification provisions that may be in this contract. This section shall remain in force despite termination of this contract (whether by expiration of the term or otherwise) and termination of the services of the Contract under this contract.
- The firm must have the financial ability to undertake the work and assume the liability. The selected firm will be required to furnish proof of insurance coverage and shall maintain at the times the limits as follows:

| | |
|--------------------------------|--|
| Coverage | Minimum Limits |
| General Liability | \$1,000,000 per occurrence (\$2,000,000 aggregate) |
| Automobile Liability | \$1,000,000 |
| Professional Liability (E & O) | \$1,000,000 per occurrence (\$2,000,000 aggregate) |
| Workers’ Compensation | Statutory Limits |
| Employers’ Liability | \$ 500,000 |

- The selected FIRM shall provide the Town with a Certificate of Insurance for review prior to the issuance of any contract or Purchase Order. All Certificates of Insurance will require thirty (30) days written notice by the insurer or FIRM’s agent in the event of cancellation, reduction or other modifications of coverage. In addition to the notice requirement above, the FIRM shall provide the Town with immediate written notice of cancellation, reduction, or other modification of coverage of insurance. Upon failure of the FIRM to provide such notice, the FIRM assumes sole responsibility for all losses incurred by the Town for which insurance would have provided coverage. The insurance certificate shall be for the initial contract period of one

(1) year and shall be renewed by the contractor for each subsequent renewal period of the contract.

- The Town shall be named as an additional insured and the statement should read “Town of Morrisville is to be added as an additional insured as evidenced by an endorsement attached to this certificate.” Only “A” rated insurance companies will be acceptable to the Town.
- The firm must have an adequate accounting system to identify costs chargeable to the project.
- The proposed method of payment for this contract is lump sum.
- The products of this contract shall be the property of the Town of Morrisville. Upon completion or other termination of this contract, the Contractor shall deliver to the Town of Morrisville reproducible copies of any text, database information, survey information, graphic materials, reports, drawing, plans, files and/or any other documents or materials pertaining to this contract. The Contractor shall also make available any calculations pertaining to this contract and provide copies of specific calculations upon request of the Town. No reports, information, or materials prepared by the Contractor under this contract shall be made available to any person or organization without the prior written approval of the Town of Morrisville.

In no event shall there be any of the following unless Town’s express prior written agreement is obtained: (i) any limitation on, or disclaimer of, implied or express warranties or the liability of Contractor; (ii) any limitation on damages, including a limitation on consequential damages; (iii) any requirement for arbitration or for mandatory mediation; (iv) any requirement that Town officials or employees keep information confidential or any requirement that records be kept confidential by the Town, unless the requirement for confidentiality meets the requirements of the Public Records Law.

Conflict of Interest Statement:

It is the policy of the Town of Morrisville that the conduct of officers, directors, project managers, or and all other persons acting as its representatives should be at all times in the best interests of the Town, its members and the general public. In performing their duties, Town representatives should not be influenced by desire for personal gain. Conflict of interest is defined as a situation in which professional judgment or behavior concerning a primary interest (in this case the integrity of Town) has been improperly influenced by a different interest (such as for financial gain). The prompt disclosure of possible conflicts of interest or of those situations where such a perception could reasonably be anticipated to arise helps to avoid injury to an agreed upon primary interest.

Firm(s) selected for these advertised services shall become aware of and comply with state laws related to gifts and favors, conflicts of interest and the like, including N.C.G.S. 14-234, N.C.G.S. 133-1, and N.C.G.S. 133-2.

Firm(s) selected for Planning and Design Services by the Town will be required to disclose any conflicts of interest for 18 months prior to the submission of the Proposal package to the Town.

If a conflict of interest is not disclosed by the contractor and a conflict of interest is determined by the Town of Morrisville to exist at a later time, the contractor will not be compensated for their prior work and will be required to reimburse the Town of Morrisville for any payments received. The Contractor would be immediately dismissed from the contract.

Changes in Personnel:

Changes to personnel on project team(s), particularly a project manager, are to be avoided wherever possible. The Contractor must request in writing to the Town for all changes to project team members. The Town will consider requests and may accept the new personnel changes, or may deny the request and consequently, the Contractor may no longer be considered for Planning and Design Services with the Town.

II. Notifications

Public Records Notice:

Records received by the Town of Morrisville in response to a bid solicitation or a request for proposal/qualifications are public records and subject to public inspection and copying. Some bid records are public as soon as received by the Town, others become public at bid opening and others at bid award.

The Public Records law (N.C.G.S. 132-1 *et seq.*) authorizes the Town to withhold from public inspection and copying legitimate and properly marked 'trade secrets'. If a record meets all of the following conditions, then the Town may withhold that particular trade secret from a public record inspection request:

- It is a "trade secret" as defined in G.S. 66-152(3); and
- It is the property of a private "person" as defined in G.S. 66-152(2); and
- It is disclosed or furnished to the Town in connection with a bid or proposal; and
- It is marked as "confidential" or as a "trade secret" at the time of its initial disclosure to the Town.

If as part of your bid or proposal, you submit to the Town any record, or portion of a record, that you consider to be a trade secret meeting the definition contained in G.S. 66-152 (2), you may clearly mark the particular record, or portion of the record, that meets the definition of trade secret as TRADE SECRET or CONFIDENTIAL TRADE SECRET, and the Town will be authorized to withhold that particular record or portion thereof, from public inspection. In the event the Town receives a public records request for records you designate as 'trade secret' the Town will notify you and give you the opportunity to, within one week of such notification, confirm in writing that the specific record, or portion of record, that you designated as TRADE SECRET meets the requirements of G.S. 132-1.2 and G.S. 66-152, and the reasons therefore. The Town will require that you indemnify the Town in the event a challenge is brought for the withholding of a record based on your having designated it a trade secret.

Addenda Notice:

If you have received this solicitation from a source other than the Town of Morrisville, it is the respondent's responsibility to ensure that all addenda have been received. Please visit <http://www.townofmorrisville.org/businesses/bid-proposal-opportunities> for the most current information.