

**TOWN OF CAVE CREEK
37622 N. Cave Creek Road
Cave Creek, Arizona 85331**

NOTICE OF REQUEST FOR PROPOSAL

April 11, 2019

PROPOSAL: General Plan Consultant

DUE DATE: May 1, 2019 – 4:00 pm

LOCATION: Town of Cave Creek, Attention: Luke Kautzman, Interim Director of Planning
37622 N. Cave Creek Road, Cave Creek, AZ 85331

The Town of Cave Creek issues this Request for Proposals for a General Plan Consultant to provide best practices and technical expertise to prepare a plan which includes the statutorily required General Plan Elements. The expected length of this engagement is expected to be approximately one (1) year starting perhaps as early as May, no later than July 2019 and culminating on or before a Special Election for the Plan in March or May of 2020. The firm or individual must have the required capabilities and an in-depth understanding and working knowledge of municipal planning, local, state and federal laws, regulations, ordinances, codes, and standards for municipalities within Arizona.

Information regarding the Town can be found on the Town's website www.cavecreek.org. The Town of Cave Creek has submitted two plans to the electorate to replace the previously adopted 2005 General Plan. Both plans were not approved by the voters. It is recommended that the 2005 General Plan (existing) and the failed 2016 and 2018 General Plan(s) be reviewed as well. Common themes attributed to the previous failure(s) of the General Plan were that the plan was too lengthy, too specific, too difficult to understand. Feedback taken from the Planning Commission and Town Council in a joint session would call for a shorter and more generalized format for the General Plan.

Competitive proposals for the services specified in this notice will be received by the Town of Cave Creek at the above specified location until the time and date cited. Proposals must be in the actual possession of the Town of Cave Creek on or prior to the exact time and date indicated above. Late proposals will not be considered. The preparation of the RFP response will be at the expense of the respondent. The Town will not reimburse the respondent for any costs associated with the preparation or submission of any proposal. All RFP responses become the sole property of the Town of Cave Creek.

Proposals must be submitted and labelled "General Plan Consultant" and include the Offeror's name and address clearly indicated on the envelope. All proposals must be completed in ink or typewritten and a complete Request for Proposal data must be returned along with the proposal by the time and date cited above. Additional instructions for preparing a proposal are provided with this notice.

I. INSTRUCTIONS TO BIDDERS

A. Preparation of Proposals:

1. All proposals shall be on the Offeror's letterhead and the forms provided in this Request for Proposal package. It is permissible to copy these forms if required. Facsimile transmittal, E-mail attachments or similarly transmitted proposals will be accepted.
2. The proposal documents and the Proposal Data Sheets (see Section VI) and Cost/Pricing Proposal Form must be submitted with an original ink signature by the person authorized to sign the offer.
3. Erasures, interlinear markings or other modification in the proposal shall be initialed in original ink by the authorized person signing the offer.
4. No proposal or data sheets shall be altered, amended, or withdrawn after the specified due time and date.
5. In addition to the Proposal Data Sheet all proposals must include the following information:
 - a. Describe the firm as it relates to public sector services: the number of employees involved, the number of clients that the firm provides planning consultant services, the number of general plans, area plans or specific plans consulted on in the last four (4) years (2014-2018).
 - b. Address each requirement of the Required Services, see section II. Provide evidence that demonstrates the firm's ability to provide the required services.
 - c. The proposed approach to provide the required services.
 - d. The consultant shall provide resumes for the proposed Project Manager and key project staff, if applicable. The resumes shall include relevant experience with similar projects and demonstrate a familiarity with the issues and topics that are anticipated to be relevant to the Town of Cave Creek General Plan Update.

- e. Describe and explain any significant changes in organizational structure, ownership or management that occurred during the last 4 years.
 - f. Business relationships with other entities: Disclose all compensation/fee arrangements (formal or informal) that your firm, its related entities or proposed personnel currently has, or within the past 12 months has had.
 - g. Provide information if the firm has been involved in any litigation related to the types of service needed to fulfill this RFP in the last three years, if so please describe the nature of the suit and the monetary amount involved.
 - h. Describe any additional feature, value added service, attributes or conditions, that the Town should consider in selecting your firm.
 - i. Attach proof of insurance - professional liability.
 - j. Provide the cost for consulting services and any supporting information necessary to qualify the firm's cost.
6. It is the responsibility of all Offerors to examine the entire Request for proposal package and seek clarification of any item or requirement that may not be clear and check all responses for accuracy before submitting a bid. Negligence in preparing a Proposal confers no rights of withdrawal after due time date.
7. Offerors are expected to make available the personnel assigned to fulfill the obligations of the RFP to present their proposal, at the firms cost, at the Town to the Town Manager and Town staff.

B. Inquiries:

Any question(s) related to this solicitation must be directed to the Town Director of Planning and/or, the Town Manager. Questions should be submitted in writing. Any correspondence related to a solicitation should refer to the Request for Proposal page and paragraph number.

C. Late Offers:

Late offers will not be considered. An Offeror submitting a late proposal shall be so notified.

D. Withdrawal of Offer:

At any time prior to the specified proposal due time and date an Offeror (or designated representative) may withdraw their proposal, facsimile transmittals E-mail or similarly transmitted withdrawals will be considered.

E. Amendment of Proposal:

Receipt of solicitation amendment must be acknowledged by signing and returning the document(s) prior to the specified proposal due time and date.

II. REQUIRED SERVICES

It is expected that the consultant/firm retained by the Town as the service provider shall enter into a contract with the Town to provide the required services at a fair and reasonable compensation. For such compensation the service provider will be expected to provide part or all the following services.

1. Be able to meet with and thoroughly review with the Town Manager, Director of Planning and other key staff as well as members of the Planning Commission and Town Council the process for successfully adopting the 2020 General Plan.
2. From that analysis and input, recommend a timeline including public involvement to meet the determined special election date.
3. Consult with the Town (Residents, Business Owners, Elected and Appointed Officials and staff) throughout the process in preparation of the 2020 General Plan.
4. Based on existing documents including previous General Plan Drafts as well as input from the public and the Town of Cave Creek, the consultant shall recommend modifications, alterations and alternatives to a draft plan, as appropriate.
5. Conduct public meetings and facilitate input in accordance with the Town of Cave Creek Public Involvement Procedures and State Law.
6. Present a draft plan to the Planning Commission at a Public Hearing.
7. The consultant will advise and aid the Town in a manner which provides the best possible outcome of having the plan approved by the electorate, including but not limited to: marketing/advertising and social media.
8. Consultant will respond to questions in a timely manner.

9. The consultant may perform other tasks or duties as determined to be required and appropriate in relation to purpose of fulfilling their duties.

III. ADDITIONAL CONSIDERATIONS

- A. Each firm(s) or individual(s) assigned to conduct the duties resulting from this RFP process shall meet the following minimum requirements:
 1. Reporting to Management: Firm(s) or individual(s) submitting proposals shall be able to report to Town staff, Planning Commission and Town Council as required.
 2. Office and Staffing Requirements: Firm(s) or individual(s) shall provide all workspace, personnel, equipment and supplies necessary to complete professional services set forth in the scope of work.
 3. Independent Contractor: Respondent to the RFP is and will be at all times during the term of this agreement an independent contractor and not an employee of the Town. As such the contractor is responsible for all taxes and insurances as required.
 4. Professional Conduct: Firm(s) or individual(s) shall demonstrate professional conduct at all times.
 5. Compliance: Firm(s) or individual(s) shall demonstrate compliance with all state and local laws including obtaining training and certifications as required by law throughout the term of the contract.
 6. Insurance: Firm(s) or individual(s) must be able to provide documentary proof of insurance coverage as requested. Insurance coverage will include as appropriate, automobile liability, commercial general liability, workers compensation, and professional liability. Professional liability insurance shall be with limits no less than \$1,000,000 per claim and \$1,000,000 policy aggregate limit. Respondents to this RFP agree to maintain appropriate insurance coverage throughout the contract period.
 7. References: Firm(s) or individual(s) must be able to provide at least three (3) professional references from other cities or towns or other appropriate related experience.
- B. Upon awarding the contract, to assist the contractor, the Town can make the following information available:

1. Documentation concerning previous attempts to pass the General Plan including meeting minutes, notes and other input.
2. Documentation and commentary from staff, Planning Commissioners and Town Council members associated with previous attempts to pass the General Plan.

IV. AWARD OF CONTRACT

- A. The Town of Cave Creek Town will award a contract for services to the firm which best meets the needs of the Town as demonstrated by the proposals as submitted.
- B. Notwithstanding any other provision of this Request for Proposal, the Town expressly reserves the right to:
 1. Waive any defect or informality; or
 2. Reject any or all offers, or portions thereof; or
 3. Reissue a Request for Proposal; or
 4. Withhold the award for any reason; or
 5. Extend the deadline for the Proposal.
- C. A response to a Request for Proposal is an offer to contract with the Town based upon the terms, conditions, and specifications contained in this Town of Cave Creek's Request for Proposal prepared by the Offeror. Proposals do not become contracts unless and until they are accepted by the Town. A contract is formed when the Town provides a signed copy of a contract to the successful Offeror. The successful contracts inception is the signing of the contract by the appropriate Town official. All terms and conditions and information contained in this Request for Proposal will be incorporated for reference and made a part of the contract, unless modified by a solicitation amendment or a contract amendment signed by the authorized Town official.

V. TERMS AND CONDITIONS

- A. Proposal Opening: Proposals shall be opened publicly at the time and place designated on the cover page of this document. The name of each Offeror shall be read publicly, and recorded. All other information contained in proposals shall be confidential so as to avoid disclosure of contents prejudicial to competing Offerors during the process of negotiation. Prices will not be read. Proposals will not be subject to public inspection until after contract award.

- B. Offer Acceptance Period: Proposals are an irrevocable offer for 90 days after the opening time and date. Pricing and payment terms: Pricing and payment terms must be submitted on an all-inclusive basis and shall include all taxes and other related cost factors associated with providing the services described in this document. Ideally, hourly fee services will be paid in monthly installments over the period of the contract.
- C. Contract: Any contract entered into pursuant to accepting the proposal shall be valid from the date of award for a period of one year.
- D. Cancellation Notice: The Town reserves the right to cancel the whole or any part of the subsequent contract without cause. The Town will issue a written thirty (30) day notice of such cancellation. Any subsequent contract must include such a clause.
- E. Evaluation: In accordance with Town policy, an award shall be made to the responsible Offeror whose proposal is determined to be the most advantageous to the Town taking into consideration the evaluation factors set forth in this Request for Proposal. After reviewing and evaluating the written materials submitted, finalists will be invited to an oral interview. The Town will contact the finalists to schedule those interviews.

Evaluation criteria shall include:

1. Consultant's demonstrated experience, competence and qualifications to perform the required services as determined based on the written response to this RFP.
2. The consultant's grasp of the project's potential issues, project approach and ability to construct a schedule for completion of the project.
3. Consultant's local knowledge of the Town of Cave Creek: the consultant's familiarity with relevant local issues/procedures/requirements which qualifies the consultant to successfully manage this project.
4. Cost.
5. For the finalists: An interview/presentation to be made after the initial review of the written responses with the Town Manager, Director of Planning, Planning Commission Chair and Mayor.

VI. PROPOSAL DATA SHEETS

Firm Name: _____

Address of office that would serve this account:

Business Phone: _____

Type of organization (check the appropriate line as indicated and provide indicated information)

_____ A corporation organized and existing under the laws of the State of Arizona

_____ A partnership, if so, please list partners who will work on or have responsibility for this contact.

Partners responsible for this contract:

Name Area of Expertise

Name Area of Expertise

Name Area of Expertise

_____ Check if an Individual (sole proprietor) responsible for this contract:

Name Area of Expertise

Number of years in business: _____

Managers assigned to oversee this contract:

Organization Area of Experience Provided Date

Employees assigned to this contract:

Name	No. of Years Employed	Area of Experience
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Please list all current public sector clients in Arizona(add additional sheets, if required):

VII. OFFER

TO THE TOWN OF CAVE CREEK, ARIZONA

The undersigned hereby offers and agrees to provide the services at the price(s) set forth in this Request for Proposal in compliance with all terms, conditions, specifications and amendments in the solicitation and any written exceptions in the offer.

Name: _____

Phone: _____

_____ Company Name	_____ Authorized Signature
_____ Address	_____ Printed Name
_____ City, State, Zip	_____ Title

