

COMPREHENSIVE PLAN

REQUEST FOR PROPOSALS

TOWN OF DAVIDSON, NC

216 South Main Street

PO Box 579

Davidson, NC 28036

Distributed May 25, 2018

1. OVERVIEW

The Town of Davidson is excited to announce the beginning of its Comprehensive Plan process. With the support of elected leadership, the Davidson Board of Commissioners, the process will be guided by a commitment to public engagement and innovation, grounded in the town's core values emphasizing its traditional character, village-based identity and sense of community, and commitment to achieving a high-quality of life for all residents. A full range of stakeholders encompassing the town's citizens, advisory boards, staff, and community stakeholders such as Davidson College, local schools, non-profits, businesses, neighborhood representatives, and religious institutions will contribute to this effort. To that end, we welcome experienced, multi-disciplinary teams to join alongside us, roll up their sleeves, and offer creative solutions to further this highly-engaged community's commitment to remaining "a distinct, sustainable, and sovereign small town."

This document represents the Town of Davidson's official Request for Proposals for consultant services to assist with the development of its Comprehensive Plan, to be undertaken beginning in the of Fall 2018 with anticipated completion in Winter 2019-2020. The following information describes the plan's context, envisioned purposes, scope of work, budget, schedule, organization, submittal requirements, and selection criteria.

2. INTRODUCTION

2.1. General Background

Davidson is a town of approximately 13,000 residents and home to Davidson College, one of the nation's top liberal arts colleges. The town is located 20 miles north of uptown Charlotte along Interstate 77, bordered on the west by Lake Norman and on the east by rural farms and residential areas. Good schools, historic architecture, a thriving downtown, and the academic setting have resulted in increased development pressures both locally and regionally. The Town of Davidson has made a commitment to addressing development pressures through thoughtful design and the implementation of traditional town planning principles – and has been recognized both statewide and nationally for its planning efforts.

2.2. Planning Background

Beginning in the early 1990s, the town demonstrated a unique commitment to community-based planning emphasizing high-quality design. Along the way, it has employed a variety of tools to further its commitments to: Its historic downtown and traditional architecture (local and national historic districts, Design Review Board); open space preservation (conservation subdivisions, overlay districts, minimum set asides, partnerships); deliberative, balanced growth (charrettes, adequate public facilities ordinance, targeted growth nodes); and retaining a mix of socioeconomic and intergenerational citizenry (inclusionary zoning, aging in

place initiatives, multi-modal transportation, greenways and parks). Likewise, the town utilizes a form-based code that prioritizes the quality and character of its buildings, streets, and public spaces. In sum, it's a design-focused community that strives to remain at the leading edge of policy, planning, and programming so that its citizens may attain and enjoy a high quality of life.

Accordingly, the Town of Davidson has been recognized for these efforts with more than 20 designations or awards at the regional, state, and national levels for its novel approaches to: Affordable housing; bicycle infrastructure and overall mobility planning; code-writing; and, plan implementation. Most recently, the town's Main Street was named a 2016 Great Street in America by the APA, and the Davidson Rural Area Plan received a 2018 CNU Charter Award for its inventive approach to balancing conservation and growth.

Since the 1990s, the town has undertaken many plans, which can be viewed on the [Plans, Reports, & Studies webpage](#). Below is a summary of plans directly relevant to the proposed Comprehensive Plan:

- The ***General Principles for Planning in Davidson (2001)*** instituted tenets to guide decisions based on our sense of community; unique downtown; active transportation; stewardship of resources; fostering diversity; proactively managing growth; and, achieving outstanding architecture and design.
- The ***Davidson Comprehensive Plan (2010)*** describes a vision for the long-term future of the town considering its regional context and current growth trends. A thematically-based plan, it recommended a Targeted Growth Plan concentrating village-based, mixed-use growth at certain locations while preserving open space throughout much of the town's eastern areas. The dramatic regional changes occurring since its adoption have left open the question of how to interpret, adapt, and improve its various directives.
- The foundation of the ***Economic Development Strategic Plan (2012)*** is based on the livability themes and goals identified in the 2010 Davidson Comprehensive Plan and provides an important connection between these and the economic strategies related to market conditions, transportation networks, and land development opportunities.
- The ***Davidson Walks and Rolls: Active Transportation Master Plan (2013)*** aims to create a vision for an improved walking and bicycle environment. It identifies future pedestrian and greenway/multi-use path facilities, including throughout the rural area.
- The ***Parks and Recreation Master Plan (2014)*** establishes a framework to create linked pedestrian and bicycle connections between parks, open space, and key destinations.
- The ***Cost of Land Use Fiscal Impact Analysis (2014)*** identifies development prototypes based on existing development in Davidson and evaluates the potential revenue generation, operating, and capital costs associated with each, including as they relate to the provision of public services.
- The ***Rural Area Plan (2016)*** offers a coherent strategy for balancing conservation and development in the midst of intense growth pressures. Covering about 3,800 acres, this

land use and transportation plan pursues a village-based growth model, interconnected neighborhoods built around public spaces, and high quality open space. It has won regional, state, and national awards for its balanced, design-based approach.

- The ***Affordable Housing Needs Assessment (2017)*** provides contextual material that can be used to inform a broader community dialogue on how to adapt the town’s affordable housing strategy – perhaps using best practices from other communities – to make the town’s housing programs more responsive to today’s needs and challenges. Davidson features a diversity of neighborhoods and people, and its residents remain committed to providing access to workforce housing – it is one of three communities in North Carolina to mandate affordable housing as part of master planned development.
- The ***Davidson Mobility Plan (2018-2019)*** is currently underway. It will serve as a Comprehensive Transportation Plan (CTP) that evaluates moving people around town. The plan will provide actionable items such as recommendations, timelines, costs, and funding sources for projects to help the town manage, sustain, and improve its transportation infrastructure. It is possible that this plan, or portions thereof, will be incorporated into the Comprehensive Plan as a distinct section, appendix, or amendment. Likewise, it’s possible this plan will lay the groundwork for further mobility issues to be explored more extensively through the comprehensive plan process.
- The ***Davidson Board of Commissioners Strategic Plan (2018)*** articulates the current board’s priorities for town governance. It contains nine strategic goals that support the long-term vision of the town. Each strategic goal contains a set of tactical priorities or an outline of processes, and action steps to reach each goal.

At the end of this document are links to these plans as well as maps showing the town’s jurisdictional area and current zoning (i.e. “Planning Areas”).

2.3. Current Conditions

The unprecedented growth of the Charlotte region in the 2000s has brought prosperity as well as challenges. Once on the metropolitan region’s periphery – and, historically, a small town unto itself with its own economic engines (the college, cotton mills) – the Town of Davidson has fought to retain its identity in the midst of a rapidly-changing landscape. It finds itself wedged between a lake to its west, fixed county boundaries on its north and east, and a meandering southern boundary that stretches roughly seven miles along the borders of its growth-oriented neighbors before tapering off at the intersection of the Cabarrus County line and highway NC 73. In between, its iconic downtown functions as both a regional destination and a funnel, collecting and distributing various trips that neither begin nor end in town. Residents old and new hold differing views ranging from excitement to frustration at the pace of development near and within Davidson and the resulting traffic congestion.

And yet, simultaneously, many residents extol the town’s virtues – its celebrated Main Street, small-town feel, picturesque college, thriving institutions and businesses, and beautiful streets, parks, and public spaces. How can we best protect these features? How can we best consider, further, and promote them in each decision we make? Does development threaten

or enable a high quality of life? How do we ensure an appropriate balance of commercial versus residential tax revenue and maintain long-term financial sustainability? How do we address socioeconomic stratification amongst our citizens and enable opportunity for all? What do we want our future to be? These are the types of questions with which citizens have wrestled – intensely – for several years. During this period each development project, each plan, each decision has been viewed in light of its consistency with our historic values and its ramifications for our future; in many cases, consensus has been challenging to achieve.

The Comprehensive Plan presents a special opportunity to have a genuine dialogue about these issues as they relate to all aspects of our community life and government. It will enable the development of a sound set of policies, initiatives, and actionable tasks to carry this town forward for years to come.

3. PROJECT DESCRIPTION + SCHEDULE + SCOPE

3.1. Project Description

The Town of Davidson seeks proposals from qualified consultants to assist in the creation of a Comprehensive Plan. The collaborative working relationship will include *outstanding*, innovative public engagement; a well-managed, clear process; and will result in a visually-engaging, usable plan document that includes actionable strategies along with a full implementation framework. To elaborate:

- **Innovative/Creative Public Engagement:** The consultant team will be asked to draw on their experience with proven techniques and to devise as well as execute new approaches based on evolving conditions. The town has been exploring a decentralized public engagement strategy with many engagement opportunities taking place around town rather than at Davidson Town Hall (at least in the initial period). This includes pop-up stands/visits to community events; stakeholder-specific and employer-based engagement; and volunteer-led initiatives (in the spirit of the Chicago Community Trust’s “On the Table” model). Inclusion of surveys and/or real-time feedback during events should be considered. And digital outreach must also be prioritized and innovative. Staff are prepared to facilitate as needed in these areas; however, consultant creativity and assistance where appropriate are key. We are interested in an extended engagement period (one to three months) culminating in a substantial summary/report that would precede any direct plan work.
- **Process:** This will be a community-based plan from start to finish. It’s anticipated that a citizen committee will be formed to work closely with staff and the consultant. In many respects, the process is as important as the document it produces. The consultant must work closely with the town’s project managers to devise a process that is transparent and highly-organized. Davidson’s history as a design-oriented community means that a multi-disciplinary approach will be

required and must inform the plan. The town has traditionally used the charrette model with much success. We are open to varying approaches and hearing how consultants have used charrettes or other meeting formats as centerpieces of engagement for comprehensive plans, for targeted engagement, or limited/no engagement based on certain conditions. Explanations of alternative strategies, such as visual modeling systems or scenario-based planning are encouraged, too.

- **Plan Document:** The document must be inviting and readable; it must also be visually appealing. As our town’s chief policy statement on governance, the Comprehensive Plan is meant to inform every decision we make. Increasingly, we’re seeing communities do just that – use it to guide discussion at meetings, launch programs, even justify each line in the budget. We want it to be used, both as a physical document and as a digital resource. We want our citizens to be proud of it: To see them referring to it at town meetings; reading it at Summit Coffee; talking about it at the farmers’ market. Specifically, it should be:
 - » Useable/Navigable: It should be clearly organized and easy to navigate and strike an appropriate balance between text and graphics.
 - » Action-Oriented: It should explicitly state the intended outcomes, identify responsible parties, and recommend strategies to pursue for each.
 - » Evolving/Adaptable: It should include forward-thinking practices and describe how these may need to be piloted and/or evolve over time.
 - » Design-Based: It should recognize the uniqueness of Davidson’s form-based code and ensure recommendations reflect this rather than a zoning-based approach to regulation. It should rely heavily on illustrative plans and diagrams to convey the desired outcomes.

These are the essential aspects of this project. Additionally, we envision a few accompanying resources preceding and following the plan:

- **Community Snapshot Report:** Produced prior to any central/kickoff event occurring, this will present an in-depth look at our community’s history, demographics, current/existing conditions, and initial future considerations. Estimated Length: 15-30 pages (including graphics).
- **Public Engagement Summary:** Produced after the initial public engagement period but prior to any central/kickoff event occurring, this will describe the results of the public engagement process, methods used, and outline the remaining public input to be collected. Estimated Length: 10-25 pages (including graphics).
- **Implementation Plan:** Produced after or concurrent with plan adoption, this will include in-depth analysis of each goal, objective, etc. and describe viable strategies for accomplishing each task on an identified timeline.

**Note:* The explanations in sub-section 3.1 are intended to be descriptive and not prescriptive. Information about other resources which consultants have produced or are interested in producing that may aid this process may be presented as part of the submittal.

3.2. Project Budget

The budget planned for this project is \$170,000. Funding will be spread over two budget years: \$85,000 is assigned to the FY2018-2019 budget and \$85,000 is anticipated for the FY2019-2020 budget.

Further points worth considering:

- **Contingency Funds:** Some firms now include or identify reserve funds within the allocated budget for use towards extra/unforeseen meetings that may arise throughout the process. Please factor this into the submittal contingency funds to be used for meetings, potential speakers, extra field work, ancillary documentation, etc.
- **Snapshot, Engagement, and Implementation Reports:** These resources – or the consultant’s recommendations along these lines – should be factored into the proposal submitted to the town.
- **Mobility Plan:** With the Mobility Plan accomplishing at least some portion of the transportation-related work through a separate contract outside of the traditional comprehensive plan process, it is believed that some of the funds typically allocated to such work can be dedicated to the reports and other tasks.

3.3. Project Schedule

The Town of Davidson envisions the following schedule to guide this process:

- **Fall 2018:** Intense Decentralized Community Engagement
 - » Produce Community Snapshot Report
 - » Produce Public Engagement Reports
- **January 2019:** Community Meeting [Summit] to Present Findings
- **Spring 2019:** Charrette and/or Additional Meeting Formats
- **Summer 2019:** Plan Composition
- **Fall 2019:** Present Draft Plan/Revisions
- **Winter 2019-20:** Consider Adopting New Comp. Plan
- **Winter/Spring 2020:** Implementation Plan

3.4. Project Scope

The scope of work is intended to guide the consultant, but also allow for flexibility in terms of the project approach. The Town of Davidson welcomes innovation and creativity from the consultant on any of the following tasks:

3.4.1. Phase 1: Public Engagement/Summary, Community Snapshot Report *FALL 2018*

- A. Engagement:** During this period the consultant will aid in developing and executing the initial public engagement strategy, producing a summary report of public engagement for use later in the process. Note: The Phase 1 engagement process is intended to be mainly decentralized, with select large meetings hosted at Davidson Town Hall or another location. It is envisioned that a public “launch” meeting explaining the process will be necessary; this could be coordinated with an introduction to elected officials and key stakeholders that same day(s). If recommended, formation of a steering committee comprised of citizens/stakeholders may occur during this time.
- B. Community Snapshot Report:** Concurrently, the consultant will produce a Community Snapshot Report summarizing the community’s history, demographics, current/existing conditions, and initial future considerations. This includes an intensive review of previous planning documents, studies, and area plans (i.e. neighboring jurisdictions/regional plans). It also includes the collection of and analysis of data related to land use, mobility/transportation, environment, economy, real estate, etc. This information will be used for the report as well as later meetings such as the charrette. The report must be completed prior to any Phase 2 public meeting.

**Note: The information gathered in 3.4.1.A.-B. will be consolidated into distinct reports, distilled, and presented to the public as part of 3.4.2.A Community Meeting.*

3.4.2. Phase 2: Community Meeting, Charrette or Additional Meetings *WINTER/SPRING 2018*

- A. Community Meeting:** The consultant will host a public meeting to officially kick off the Comprehensive Plan. The meeting will involve review of the Public Engagement Summary and the Community Snapshot Report; an overview of the process, goals, etc. will be provided. The meeting may involve initial engagement activities.
- B. Preparatory/Stakeholder Meetings:** The consultant will facilitate preparatory stakeholder interviews to review stakeholder, property owner, and citizen concerns, identifying plan opportunities and constraints.
- C. Design Exercise/Additional Meetings:** The consultant will lead a multi-day charrette or series of meetings to conceptualize balanced growth scenarios for the study area; an initial public input session may occur on the charrette’s first day, with iterative feedback opportunities occurring thereafter. By the end of the charrette/Phase 2, a preferred framework

supported by conceptual plans shall be identified for implementation. Phase 2 will conclude with a public presentation of the plan framework. The meetings' and/or charrette format will be determined jointly by the consultant and project managers, and they will be highly interactive and allow the community a variety of input opportunities.

3.4.3. Phase 3: Plan Composition, Draft Plan Presentation/Revisions

SUMMER/FALL 2019

- A. Plan Composition:** The consultant will prepare and distribute a draft plan to the project managers for review by staff and/or the Steering Committee (depending on the approach used). The plan subject matter will include topics ranging from land use, affordable housing, economic development, historic preservation, environment, quality of life, and mobility (based on the outcomes of the plan effort currently underway). A consolidated set of comments will be provided and revisions will be made by the consultant. Depending on the quality of the initial/subsequent drafts, this process may occur twice (or more as needed, within reason).
- B. Draft Plan Presentation/Joint Work Session:** The consultant project manager and/or town project managers will present the draft plan to a joint work session of the planning board and board of commissioners for review/comment.

3.4.4. Phase 4: Plan Adoption*

WINTER 2019-2020

- A. Planning Board Review/Comment:** The planning board will review the draft plan and offer any further comments.
- B. Planning Board Recommendation:** The planning board will review the proposed final plan and make a recommendation.
- C. Board of Commissioners Meeting & Public Comment:** The board of commissioners will discuss the proposed final plan in a public meeting format.
- D. Board of Commissioners Adoption:** The board of commissioners will vote on approving the plan.

**This phase, including revisions, can likely be completed without consultant assistance.*

3.4.5. Phase 5: Implementation Plan

WINTER/SPRING 2020

- A. Draft Plan:** The consultant will produce an Implementation Plan building upon the Comprehensive Plan recommendations; the Implementation Plan will directly inform or become substantially integrated with the

Davidson Board of Commissioners Strategic Plan. It will include in-depth analysis of each goal, objective, etc. and describe viable strategies for accomplishing each task on an identified timeline. It may be produced and/or adopted in Phase 4 depending on how the process goes.

- B. Plan Revisions:** The plan will be reviewed by the project managers. A consolidated set of comments will be provided and revisions made by the consultant. Depending on the quality of the initial/subsequent drafts, this process may occur twice (or more as needed, within reason).
 - C. Planning Board/Board of Commissioners Comment/Recommendation:** The appropriate advisory and/or legislative board will review the proposed plan and offer comment. This set of revisions will likely be made by the project managers. It is likely Phase 5.C. can be completed without consultant assistance.
-

4. PROJECT ORGANIZATION

4.1. Project Managers

The project will be jointly managed by the following town representatives:

- **Cristina Shaul**, Public Information Officer
cshaul@townofdavidson.org
704.940.9602
- **Trey Akers**, Senior Planner, Planning Department
takers@townofdavidson.org
704.940.9634

4.2. Consultant Point of Contact/Roles

The consultant will designate a highly responsive, single point of contact to oversee the consultant team(s). The consultant will prepare and collaboratively manage with town staff a work plan including a refined scope of work, timeline, and budget. Town staff will assist the consultant with coordination of meetings.

[CONTINUED ON NEXT PAGE]

5. SUBMITTAL INFO. + SELECTION PROCESS + CRITERIA

5.1. Submittal Requirements

5.1.1. Written Proposal

Respondents should submit a written proposal that includes:

- A. Firm Profile:** A brief history of the firm and relevant details.
- B. Team:** Identification of the individual or individuals in the firm/firms who will work on the project. This information should include a list of each person's relevant experience and/or qualifications.
- C. Experience/Examples:** Examples of previous work and relevancy to this project. This should include official references for the town's consideration.
- D. Services Offered:** A description of the range of services and list of products or deliverables to be provided. This should include a description of what work will be performed directly by the lead consultant and what work will be performed by sub-consultants or affiliated team members (if any).
- E. Work Scope:** A scope of work to complete the project based on this RFP.
- F. Budget/Costs:** Costs for the project, including hourly rates and a not-to-exceed total budget. The proposal should include alternative line-items based on the alterations/reductions in scope:
 - A significant element of the mobility/transportation component is covered under Mobility Plan (some amount of transportation work could still be necessary);
 - Additional design expertise that is offered for the plan and/or charrette;
 - Modeling exercises incorporated into the plan;
 - Public engagement events and strategies such as surveys, digital outreach, etc.;
 - Phases 4 and 5.C. are handled primarily by town staff.
- G. Schedule:** A schedule for the project, in month-long increments, including deadlines for completion of each Phase/Sub-phase including reports, dates for public meetings and charrette, and deadlines for draft plans and presentations.

5.1.2. Number of Copies/Address

The proposal shall include two hard copies and one digital copy. Send proposals to:

Cristina Shaul, Public Information Officer
216 South Main Street

PO Box 579
Davidson, NC, 28036.
cshaul@townofdavidson.org

5.1.3. Deadline

The proposal must be received no later than 4:00 p.m. Friday, June 29, 2018.

5.1.4. Questions

Questions should be directed to Trey Akers, Senior Planner, at 704.940.9634 or via email: takers@townofdavidson.org. Additionally, see the Selection Process section below; there are opportunities for group calls.

5.2. SELECTION PROCESS

The Town of Davidson envisions the following process to guide consultant selection:

- **May 25:** Send out RFP
- **June 12-13:** Host one hour group calls for questions to be asked of/answered by staff regarding the RFP and/or related town topics.
 - » **June 12 at 11:00 am EST:** [Davidson RFP Call-In Meeting 1](#)
Phone: +1 (872) 240-3212, Access Code: 359-968-493
 - » **June 13 at 1:00 pm EST:** [Davidson RFP Call-In Meeting 2](#)
Phone: +1 (669) 224-3412, Access Code: 728-929-613
- **June 29:** RFP Responses Deadline
- **July 12-13:** Phone/Web Interviews [Select Participants]
- **August 2-3:** On-site Interviews [Finalists]
- **Mid-August:** Select Consultant
- **End of August:** Finalize Contract

**The schedule is tentative and subject to change.*

5.3. Selection Criteria

Below is a list of attributes the Town of Davidson envisions considering in consultant selection:

- Qualifications and experience in creating comprehensive plans and regulatory/implementation frameworks of plans;
- Detailed proposal of services and specific costs for each phase;
- Ability of consultant to meet expected project completion schedule;
- Ability to understand existing conditions/local context, including facilitation experience with highly-engaged citizens in a changing community;

- Capacity to deliver design-oriented solutions that will continue to put Davidson on the leading edge of managed growth policy/practice;
 - Creativity/willingness to innovate (including examples) in response to Items 3.1 Project Description and 3.4 Project Scope.
-

6. MISCELLANEOUS

6.1. Notices

Respondents are hereby made aware of the following notices

- **Discretion of the Town:**
 1. The Town of Davidson reserves the right to reject any or all proposals.
 2. Notwithstanding anything to the contrary in this document or in any addendums to this document, unless the contrary provision refers specifically to this provision, the Town of Davidson reserves the right to negotiate changes of any nature with any applicant with respect to any term, condition, or provision in this document and/or in any proposals, whether or not something is stated to be mandatory and whether or not it is said that a proposal will be rejected if certain information or documentation is not submitted with it.

All deadlines are for the administrative convenience or needs of the town and may be waived by the town in its discretion. Once an agreement is signed, the parties to the agreement may enforce the agreement according to its terms as allowed by applicable law.

7. RESOURCES

7.1. Maps

- Map of the [Town of Davidson](#) (i.e. Area & Context), Including Current Zoning (i.e. Planning Areas).
- Maps & GIS Information [Webpage](#)

7.2. Plans/Codes/Studies

- [General Planning Principles](#)
- [Davidson Comprehensive Plan](#)
- [Davidson Planning Ordinance](#)
- [Board of Commissioners Strategic Plan 2018-2019](#)
- [Housing Needs Assessment](#)

- [Rural Area Plan](#)
- [Cost of Land Use Fiscal Impact Analysis](#)
- [Economic Development Strategic Plan](#)
- [Davidson Mobility Plan](#) [In Progress]
- [Davidson Walks & Rolls: Active Transportation Master Plan](#)
- [Parks & Recreation Master Plan](#)

[END OF DOCUMENT]