



TOWN OF MOORESVILLE

Historic District & Downtown Design Standards Update

Request for Qualifications

Introduction

This entire set of documents constitutes the Request for Qualifications (RFQ). The proposer should return the proposal with all information necessary to properly analyze the proposer's response in full. Proposer's notes, exceptions, and comments may be rendered as an attachment, provided the same format of this RFQ text is followed.

Purpose of Request for Qualifications (RFQ)

Background and Objectives

The Town of Mooresville (“the Town”) is a growing community of over 50,000 residents, located in the Lake Norman area north of Charlotte, and the largest municipality in Iredell County. The traditional core of Mooresville features a vibrant, historic downtown area surrounded by several residential neighborhoods. The Town is home to several significant historic districts and individually landmarked properties. Among them are four National Register Historic Districts: Mooresville Historic District (1980), South Broad Row (1980), Mooresville Mill Village (2012), and Mooresville Historic District Boundary Extension (2020).

In 2013, the Town designated the downtown commercial core area as a Local Historic District, codified on the zoning map as the “Historic Preservation Overlay” (HPO). This district has a period of significance spanning from the late nineteenth to early twentieth centuries, matching the era in which the railroad was the catalyst for economic growth in and around downtown. Also in 2013, the Town adopted the first set of Design Standards to assist the Historic Preservation Commission (HPC) and staff in making defensible determinations regarding

proposed work to properties within the HPO and on the Town's 14 Local Landmark properties. The Town's list of Local Landmark properties includes several significant residences, three historic African-American cemeteries, and the Town's public library building, all dating from the late nineteenth to early twentieth century. Though minor updates have occurred over time, the Historic Standards have remained substantially the same since their original adoption in 2013.

Separately, the Town recently adopted a new Unified Development Ordinance (UDO) in February 2022. This document overhauled the zoning map and development standards for the Town, and relaxed development standards like parking, landscape, maximum height, and density restrictions for the downtown area (represented as "Traditional Downtown" or "TD" on the official zoning map). While the UDO establishes baseline form and design standards for new development, it does not differentiate standards for new development in the downtown area, that sits beyond the boundaries of the HPO.

Request for Qualifications

The Town is requesting information on qualifications from experienced consulting firms to review and update two documents in accordance with the Scope of Work identified in this RFQ, as summarized below:

Historic District Standards

- Revisions to address consistency with the Town's new Unified Development Ordinance (effective February 2022 and subsequent amendments).
- Revisions to improve clarity of the Standards.
- Expansion of applicable standards to residential properties, institutional buildings, and cemeteries to accommodate the recent landmarking actions and the planned expansion of the HPO.
- Inclusion of industry standards for best practices.

The updated Historic District Standards should be a user-friendly document based on modern preservation practices that may be used as a tool for the citizens of Mooresville, the HPC and Town staff to preserve the Town's unique historic character.

Downtown Form & Design Standards (as a component of the Unified Development Ordinance)

- Form and Design Standards prepared to address new development in the Traditional Downtown zoning district but outside the HPO, formatted to be incorporated in the UDO as a text amendment.

The updated Downtown Form & Design Standards should be a clear and usable amendment to the UDO that accommodates high-quality, mixed-use urban development that matches and enhances the character of Mooresville's downtown area.

The following documents will form the basis for a contract for the awarded consultant:

- This document and any addenda,
- The submitted response,
- All required M/WBE documentation,
- The signed Town's Standard Contract, and
- The final and signed Statement of Work.

Scope of Work

The Town of Mooresville is issuing this RFQ to solicit information from firms with a background in Historic Preservation to provide a comprehensive update in the Town's Historic Preservation Standards. The selected proposer will work with a Planning Department-led group to complete the project. The scope of this project includes the following:

1. Conduct a comprehensive review of the Historic District Standards and prepare proposed revisions to:

- Address internal inconsistencies, omissions, and errors, including any grammatical errors.
- Ensure the Standards generally conform to the Secretary of Interior Standards for Rehabilitation.
- Conform to the new UDO, including UDO Section 2.5.15 (Certificate of Appropriateness) and 3.6.3 (Historic Preservation Overlay).
- Revise vague, unclear, or confusing language and ensure that language, terms, and intent are consistent from one section to another.
- Ensure essential words used in the text of the document are defined in the Definitions section and revise incorrect or inadequate definitions.
- Reflect best practices in historic preservation, including but not limited to use of modern building materials and components (example, metal awnings).
- Address procedures for issuance of emergency Certificates of Appropriateness.
- Revise the residential “guidelines” section to read as “Standards,” to accommodate future growth of the HPO into residential areas and current application to residential Local Landmark properties.
- Add a section addressing modification and preservation of historic cemetery properties, modeled on documentation from the recent Local Landmarking of the Green Acres, Catawba, and Junction cemeteries, and best practices for preservation of historic cemeteries.
- Add a section addressing institutional buildings, based upon prominent church and government buildings in and near the HPO (i.e. Public Library, Pump Station buildings), based upon best practices for historic preservation.
- Add a section addressing demolition of properties in the Commercial Core historic district, and improve the section addressing demolition for residential properties.
- Revise, add and change other sections of the Standards in accordance with comments received from the HPC, other stakeholders, and the public as part of the collaborative process described below.
- Implement improvements to the form and appearance of the document to improve usability and access to information, including illustrations. The final product should be in both editable Word and interactive PDF formats.

2. Conduct a comprehensive review of the Unified Development Ordinance, particularly the standards for the Traditional Downtown (TD) zoning district and building form and design standards and:

- Draft a new section to UDO Section 5.9, “Form and Design Standards,” which establishes a specific set of form and design standards for building and site design in the Traditional Downtown (TD) zoning district.

- This new section should be cohesive and consistent with all other sections of the UDO, particularly Section 5 (Development Standards).
- The language should reflect best practices in modern development and architectural requirements, and require high-quality development that is consistent and compatible with the existing built environment of Mooresville’s downtown area, including but not limited to the following characteristics:
 - i. Build-to lines for new buildings and similar site design characteristics;
 - ii. Interaction with existing and proposed streetscape;
 - iii. Form, scale, and massing of new buildings;
 - iv. Placement and orientation of uses in mixed use buildings;
 - v. Architectural materials and decorative elements;
 - vi. Provision and design of high-quality urban open space;
 - vii. Façade fenestration/transparency.
- Language that guides the overall compatibility of new development with the surrounding built environment of the downtown area, that does not discourage variation in architectural style or innovative development concepts.

3. Prepare updates using a collaborative process

Town staff will assist the firm in facilitating the process, including but not limited to meeting arrangements, advertising of public meetings, workshops and hearings, and any additional logistics. Staff will also work directly with the firm by reviewing any work product before submission to the reviewing body.

- Prepare drafts of the proposed Design Standards for review and comment by staff, Historic Preservation Commission, other stakeholders, and public.
- Prepare materials for community outreach efforts, including multiple updates and workshops with the Historic Preservation Commission and the public.
- Prepare and present proposed changes to the Historic Preservation Commission and Town Board of Commissioners as part of the adoption process.

Proposal Format

The Town requires that the Proposer’s proposal be submitted in the format outlined in this section. The Town reserves the right to require additional information or materials after the proposals are submitted.

- Keep responses simple and economical, providing a straightforward and concise description of the proposed solution to satisfy the requirements of this request.
- Display the Proposer’s name in a prominent location on all submitted materials.
- Describe all products and services unambiguously and with precision.
- Costs incurred preparing and submitting a response to this request are entirely the Proposer’s responsibility and not chargeable to the Town.
- Project timeline with milestones.
- All responses, documents, terms, and information related to the proposer’s response to this RFQ shall be submitted with the response package prior to the submission deadline. No separate schedules, agreements, terms, conditions, etc. shall be recognized or accepted if not submitted with the response to this RFQ.

Proposals must include a table of contents listing all sections, figures, and tables. Proposals should be kept around 20 pages in total length. Major sections and appendices should be separated by labeled index tabs; pages must be numbered. Submitted proposals must address the requirements completely and accurately. Table of contents and title pages do not count towards the overall page count.

Proposer Questions and Inquiries

Proposer Questions and Inquiries relative to this RFQ must be submitted in writing only to David Cole, *Town of Mooresville Planning and Community Development Planner*, via e-mail: dcole@mooresvillenc.gov. Any oral responses made by any representative of the Town may not be relied upon. Any supplements or amendments to this RFQ will be in writing and furnished to potential proposers.

RFQ Response Submission

Proposers must submit Proposals electronically. To reduce printing costs and to facilitate recycling, we request that only electronic proposals in PDF format be submitted prior to the deadline. **Electronic proposals should be submitted by attaching a single file of the required bid forms to an email entitled, “PROPOSAL – Historic Standards Update” and emailed to: dcole@mooresvillenc.gov and received no later than 12:00 pm (Noon), March 10, 2023.** Such submission will not be opened until the time for receiving Proposals has come. Please do not wait until the last minute to send your Proposal to avoid any possible delay that may occur during the transmittal of files. A screen print of the email receipt will be used by the Town as verification of the time received. Late proposals will not be considered.

The Town will not be obligated for the expenses of any provider arising out of preparation and/or submittal of responses to this RFQ. Any and all proposals to this RFQ are to be prepared at the cost and expense of the respondents, with the express understanding that there may be no claims whatsoever for the reimbursement of any costs, damages, or expenses relating to this procurement from the Town or any other party for any reason (including the cancellation of this RFQ). Proposals must be made in the official name of the individual, firm, or corporation under which the business is conducted (showing official business address) and must be signed in ink by a person duly authorized to legally bind the business entity submitting the proposal.

All proposals should be complete, carefully worded, and convey all the information requested by the Town. If errors or exceptions are found in the proposal, or if the proposal fails to conform to the requirements of the RFQ, the Town will be the sole judge as to whether a proposal meets these requirements.

All data, materials, and documentation shall be available in a clear, concise form. The Town reserves the right to reproduce proposals for internal use in the evaluation process.

Proposers are expressly forbidden from contacting any other Town employee or Town appointed or elected official regarding this RFQ. Any such outside contact may result in disqualification from the request for proposal process.

The Town reserves the right to hold proposals open for a period of ninety days (90) days after due date before making awards.

Anticipated Schedule of Events

Activity	Date
Release Date	February 10
Response Submission Date	Noon: March 10, 2023
Internal Evaluation	March 13-17, 2023
Interviews (As Needed)	March 27-March 31, 2023
Notification of Tentative Selected Proposer	April 5, 2023
Contract Approval Process (Board of Commissioners)	April-May, 2023

Town Contact

David Cole
Planner
dcole@mooresvillenc.gov

Selection Process

Proposals will be evaluated for suitability, quality, and completeness to the Town by an Evaluation Panel. Selection(s) shall be made from all offers deemed to be fully qualified and best suited among those submitting proposals based on the evaluation of criteria in the RFQ (detailed below).

The Evaluation Panel may cancel this RFQ or reject proposals at any time prior to an award and is not required to furnish a statement of the reason why a particular proposal was not deemed the most advantageous. The Town reserves the right, as part of the selection process, to request on-site (or virtual) demonstrations and/or presentations. If such demonstrations or presentations take place, proposers will be selected for this process based on scores derived from the scoring matrix, which includes M/WBE participation, local availability, and all other applicable criteria. The scoring of the demonstration or presentation must be based upon the criteria from one or more of the original evaluation factors. After the demonstrations or presentations, each proposer will then be re-graded on the same criteria. The number of proposers chosen to take place in the demonstration/presentation process is subject to administrative discretion. The successful proposer(s) will be selected based on a combination of the proposal evaluation scores and the ability to provide the best overall solution for the success of the project. Scoring criteria will include M/WBE participation, local availability, and all other applicable criteria shown below.

Proposal and Potential Presentation Evaluation Scoring Criteria Below is a description of the evaluation criteria that will be used to evaluate each section of the proposals as well as any potential presentations. To be deemed responsive, it is important for the firm's proposal to contain appropriate detail to demonstrate satisfaction of each criterion and compliance with the performance provisions outlined in this RFQ. The proposal and related appendices will be the

primary sources of information used in the evaluation process. Proposals must contain information specifically related to the proposed products and services requested in this RFQ. Failure of any firm to submit information requested may result in the elimination of the proposal from further evaluation. The following weighted scale will be utilized by the Evaluation Panel to evaluate and score each proposal:

- **M/WBE Commitment:** Consultant’s efforts to comply with all the terms and conditions of the North Carolina’s Minority and Women Business Enterprise (M/WBE) Program through award of subcontracts to minority and women-owned business enterprises and utilization of minority and women owned business enterprise suppliers to the fullest extent consistent with the efficient performance of this contract. If an entity is certified as a Minority Business by a state other than North Carolina, proof of certification must be submitted with the proposal.
- **Location of Business:** In order for the consultant to receive points allocated for location of business, the consultant shall submit the required documentation to comply with provision A (Mooresville/Iredell County/Mecklenburg County presence) or provision B (North Carolina presence) determined by the physical location of the firm (P.O. Box does not qualify).
- **Methodology/Approach:** How well does the proposal indicate that the consultant has the organizational structure needed to successfully execute this project? How well has the consultant demonstrated a methodology to deliver the project as specified in this RFQ and be responsible for the overall project deliverables? How well does the proposed implementation approach meet best practices for a project of this type, size, and environment? Does the proposal articulate a clear understanding of the Town's needs and expectations related to the project? Has the consultant demonstrated an understanding of the services requested by the Town by proposing a methodology and project timeline that will deliver a successful implementation of those services?
- **Experience/Knowledge:** Does the proposal present evidence of successful evaluation, planning, and cost estimation of similar complexity and size? Does the organization demonstrate thorough knowledge of high-quality architectural design, historic preservation, and its relation to the built environment? Does the proposal describe an organization that will meet and support the level of service that the Town expects for the duration of the project? Does the proposal demonstrate that the consultant has the specific skills and resources needed to execute the project as specified in the RFQ? Does the proposed project team have the experience to implement the proposed methodology?

Proposal Evaluation Criteria

The following weighted scale will be utilized by the Evaluation Panel to evaluate and score each Proposal:

Factor	Criteria	Weight
1	M/WBE Commitment	5%
2	Location of Business	10%
3	Methodology/Approach	25%
4	Experience/Knowledge	60%

Other Notes

The current Historic District Standards, as well as the adopted Unified Development Ordinance (UDO) are available on the Town of Mooresville's website at

https://www.moorevillenc.gov/government/departments/planning_community_development/planning.php.

Please see the Town's official zoning map at

<https://moorevillenc.maps.arcgis.com/apps/webappviewer/index.html?id=8873a1cb5ede47a3a746101f9c471doc> for an overview map of the Town's Historic Preservation Overlay (HPO) and Traditional Downtown Zoning District (TD).