

Z21 Zoning Update
Request for Qualifications and Proposals
Review and Analyze Kenton County's Zoning Ordinances

Planning and Development Services of Kenton County, Kentucky

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Part 1 Introduction

Kenton County is located in northern Kentucky and is part of the greater Cincinnati metropolitan region. With a population of approximately 165,012, the county is unique in that it is comprised of 20 individual jurisdictions featuring a diverse character ranging from built-up urban and first-ring suburban communities to developing suburbs and open rural areas.

Planning and Development Services of Kenton County, Kentucky (PDS) provides planning, zoning administration, and other development related services to each of the 19 cities as well as the unincorporated areas of the county. In doing so, PDS serves as staff to over 180 elected or appointed officials.

In 2014, the Kenton County Planning Commission (KCPC) adopted *Direction 2030: Your Voice, Your Choice*, the county's comprehensive plan. The new web-based plan was the product of a multiple year initiative which included a complete overhaul the outdated goals and objectives, bringing the plan into the 21st Century. This process included over 100 opportunities for input from the general public, city and county staff, elected officials, developers, and other interested parties. From that public input process, numerous goals, objectives, recommendations, and tasks were developed indicating the need for updating the zoning ordinances.

Kenton County developed a "model" set of zoning regulations for 19 jurisdictions in the county which were adopted in the early 1980's. With the exception of the City of Covington who completely overhauled their zoning code in 2007, there have been no significant updates to the zoning ordinances and all issues are currently dealt with on reactionary basis. Since the year 2000 there have been over 700 text amendments to the 19 zoning ordinances located in the county. This fact, along with the public input received during the *Direction 2030* process, make it evident that the existing zoning ordinances are in need of updating.

Most of the zoning ordinances throughout the county still operate on the same administrative policies and protocol making them approximately 70 to 80 percent similar to one another with the exception of the City of Covington, as noted above. The differences between many of the ordinances still working off of the 1980's model are regulations which address new development trends or specific issues that are unique to a community.

PDS staff is embarking on a project to modernize the zoning ordinances of each jurisdiction with regulations that bring them into the 21st Century. Each jurisdiction in Kenton County has its own character and development form ranging from urban, first-ring suburban, suburban, and rural. The final product is to create ordinances that are consistent with one another but which also contain regulations which reflect the vision and desired development pattern of each jurisdiction.

Part 2 Summary of Process

PDS is requesting qualification submissions from professional consulting firms to review and diagnose the zoning ordinances for each of the 19 jurisdictions located within Kenton County to determine whether those regulations promote the city's/county's vision and produces desired outcomes. It is furthered desired that the consultant assists PDS staff on an as-needed basis as staff works to update those ordinances.

The selection of a consultant will occur through a two-step process:

Step 1: Request for Qualifications

- Request for qualifications submitted
- Selection of qualified consultants for interviews
- Interviews of qualified teams
- Consultants selected for shortlist

Step 2: Request for Proposals

- Request for proposals submitted from shortlist
- Interview of proposal teams
- Evaluation and selection
- Contract awarded

The following are the basic objectives that PDS seeks to accomplish by reviewing and analyzing the zoning ordinances within Kenton County:

1. Identify barriers to implementation of the goals and objections of *Direction 2030*.
2. Identify opportunities to streamline the development review and approval process.
3. Identify opportunities to modernize/reorganize/update the zoning ordinances.
4. Identify modern regulations and new trends that are not addressed within the zoning ordinances.
5. Identify sections where graphics, tables, and/or charts are appropriate and will make the zoning ordinances more user-friendly, easier to understand for citizens, business and property owners, consultants, and developers.

Key points PDS staff will consider in selecting the successful firm include:

1. Professional Qualifications. The education, training, registration, and amount of relevant experience of the proposed key project personnel.
2. Specialized Experience and Technical Competence. The firm's specialized experience and technical competence on similar projects, including the effectiveness of the proposed project team to address unique local issues at a detailed level, and incorporating appropriate community engagement processes (management structure and coordination of disciplines, offices and/or subcontractors).

3. Capacity of the Firm to Accomplish the Required Services on Schedule and within Budget. The firm must demonstrate an ability to complete projects within specified completion dates and budget.
4. Past Performance. Past performance of work on similar or comparable planning and development regulation contracts that have been successfully adopted and implemented should be demonstrated, including the ability to understand and incorporate zoning and development tools that address unique local issues. Include references and letters of commendation with a focus on zoning ordinances incorporating graphics, and internet/mobile-based platforms.
5. Understanding of Project. An understanding of the type of project work to be performed and a plan to complete the work should be clearly demonstrated.
6. Design Quality Assurance. The team's quality control processes and management approach that will be used on the project.

Part 3 Request for Qualifications

Submittal Requirements

PDS staff will utilize a qualifications-based selection process as the first step in determining a consultant to assist with this project. Successful consultants must provide a team with the demonstrated qualifications, experience and expertise to complete the project. Team members must demonstrate an understanding of the requirements for the project, provide references for similar successful projects, demonstrate positive public participation skills and show an ability to work within a finite schedule.

All submissions must include the following information:

1. Identification of Consulting Team:
 - Project Director with a list of team members and identification of responsibilities for each member.
 - Contact information for the Project Director, including e-mail address.
2. Qualifications:
 - Resumes of only the professional staff who will be directly involved in the project, demonstrating qualifications and related experience and expertise.
 - Descriptions of the firm's qualifications to perform the project. This should include descriptions of similar projects successfully completed by the staff assigned to the project team and relevant planning techniques which may be applicable to this project, such as the use of analysis matrices, web-based/mobile technologies and public participation techniques. Standard firm project sheets may be included in the appendices.
 - Description of other relevant experiences of the team.
3. References:
 - List of references, including brief description of projects and contact name and telephone number.

No pre-submission conferences will be held in conjunction with this RFQ. Questions concerning this project must be submitted via e-mail to Andy Videkovich, AICP, Current Planning Manager for Planning

and Zoning Administration Department (zoningreview-rfp@pdskc.org) by 5:00 P.M. on January 9, 2017. Clarifications to the RFQ and responses to all questions will be posted online at www.pdskc.org by January 16, 2017. No interpretation made to any respondent regarding the meaning of the RFQ shall be binding upon PDS staff unless it is set forth in writing and distributed via addendum by the PDS staff.

Directions for Submission

All submissions must be no more than 15 numbered pages, (excluding cover, table of contents, cover letter, dividers, and appendices) in a letter format, with four bound copies and one unbound copy along with a complete PDF on an electronic CD version or thumb drive, delivered to the address below before 5:00 PM on January 30, 2017. The Appendices are intended for including the firms' standard project description sheets and marketing materials.

Submissions shall be enclosed in a sealed envelope. PDS staff will not accept oral submissions, or copies received by telephone, facsimile machine, or email. All submissions received after the deadline will not be given consideration. PDS staff reserves the right to reject any and all submissions or portions of submissions, to waive minor deficiencies, or to solicit new submissions on the original project or on a modified project as may be deemed necessary or in the best interest of PDS staff.

Selection Process

All firms submitting a proposal should be prepared to participate in an interview. Interviews will take place with time given for a formal presentation, followed by a question and answer period. Interviews will be conducted only with the professional staff that will be directly involved in the project.

Key points PDS staff will consider in selecting the successful firm include professional qualifications, specialized experience and technical competence, capacity of the firm to accomplish the required services on schedule and within budget, past performance, understanding of project, and design quality assurance (see Attachment A for how these items will be scored).

PDS staff will evaluate the RFQ submissions and interview consultant teams. Based upon the interviews, PDS staff will select a short list of consultants to provide proposals identified within this document.

Part 4 Submission of Proposals

Submittal Requirements

Only those firms short listed through the RFQ process will be permitted to submit a proposal for the project. PDS staff will select several consultants to provide proposals for the project identified within this document. Proposals should include, at a minimum:

Section 1: Introduction and Executive Summary – Include a brief executive summary of the major facts or features of the proposal, including any conclusions, assumptions, and recommendations the consultant desires to make. The executive summary should be designed specifically for review by a non-technical audience.

Section 2: Experience – Submit a description of at least five relevant projects. The description must provide the following information at minimum:

1. Client;
2. Date of Project;
3. Client Contact Name, Title, and Current Telephone Number and Email Address;
4. Status of Project; and
5. Brief Description of Project.

The contractor agrees that PDS may contact the references given, and visit installed sites.

Section 3: Proposed Project Approach – Describe how the consultant will:

1. Undertake the review and analysis of the 20 zoning ordinances within Kenton County;
2. Propose to address the different needs and goals of each jurisdiction;
3. Propose to deliver and present the report findings to the 20 jurisdictions; and
4. Anything else that might be relevant to how the consultant approaches this project.

Section 4: Price Proposal – Submit an itemized list of anticipated expenses for the completion of the review and analysis of Kenton County’s zoning ordinances. Please include a flat fee proposal for the initial zoning ordinance analysis project as well as an hourly rate for assisting PDS staff on an as-needed basis as staff works to update those ordinances.

The above section is a preliminary list of information that will be request of the short-listed firms. PDS reserved the right to request additional information, not provided in this document, of those short-listed firms or to provide those firms with additional information regarding the scope of work requested for proposals.

Contractor Selection

All proposal materials submitted shall become the property of PDS, which reserves the right, in its sole discretion, to use without limitation any and all information, concepts, and data contained therein.

The selection process will include the following steps:

- Request for proposals submitted from shortlist
- Interview of proposal teams
- Evaluation and selection
- Contract awarded

Key points PDS staff will consider in selecting the successful firm include:

1. Professional Qualifications. The education, training, registration, and amount of relevant experience of the proposed key project personnel.

2. Specialized Experience and Technical Competence. The firm's specialized experience and technical competence on similar projects, including the effectiveness of the proposed project team to address unique local issues at a detailed level, and incorporating appropriate community engagement processes (management structure and coordination of disciplines, offices and/or subcontractors).
3. Capacity of the Firm to Accomplish the Required Services on Schedule and within Budget. The firm must demonstrate an ability to complete projects within specified completion dates and budget.
4. Past Performance. Past performance of work on similar or comparable planning and development regulation contracts that have been successfully adopted and implemented should be demonstrated, including the ability to understand and incorporate zoning and development tools that address unique local issues. Include references and letters of commendation with a focus on zoning ordinances incorporating graphics, and internet/mobile-based platforms.
5. Understanding of Project. A clear understanding of the type of project work to be performed and a plan to complete the work should be clearly demonstrated.
6. Design Quality Assurance. The team's quality control processes and management approach that will be used on the project.

Directions for Submission

All submissions must be no more than 30 numbered pages, (excluding cover, table of contents, cover letter and dividers) in a letter format, with four bound copies and one unbound copy along with a complete PDF on an electronic CD version or thumb drive, delivered to the address below before 5:00 PM on March 17, 2017.

Submissions shall be enclosed in a sealed envelope. PDS staff will not accept oral submissions, or copies received by telephone, facsimile machine, or email. All submissions received after the deadline shall be returned. PDS staff reserves the right to reject any and all submissions or portions of submissions, to waive minor deficiencies, or to solicit new submissions on the original project or on a modified project as may be deemed necessary or in the best interest of PDS staff.

Budget and Contract

Following selection of the successful firm, a detailed Scope of Work will be developed by PDS staff and the consultant to outline the specific purposes, objectives and tasks of the project. The consultant will be required to enter into a standard PDS contract, which will be subject to approval by the Executive Director of PDS or the PDS Management Board.

All persons awarded and/or entering into contracts with PDS staff shall be subject to and required to comply with all applicable Local, State, and Federal provisions pertaining to non-discrimination, Equal Employment Opportunity and Affirmative Action.

Part 5 Project Schedule

PDS anticipates reviewing all qualifications, proposals, selecting individuals or firms for interviews and starting the project based on the following tentative schedule:

Date	Activity
January 2, 2017	Advertise Request for Qualifications
January 9, 2017	Questions due from consultants
January 16, 2017	Responses available on PDS website
January 30, 2017	Consultant submission of qualifications due
Week of January 30, 2017	Review of submissions and selection of qualified firms
Week of February 13, 2017	Tentative interviews timeframe of qualified teams
Week of February 20, 2017	Selection and notification of short-listed consultants to provide a specific proposal
March 24, 2017	Consultant submission of proposals due
Week of March 27, 2017	Review of submissions
Week of April 3, 2017	Interviews of proposal firms, if needed
April 10- April 19, 2017	Selection of consultant, and development and negotiations, contract and scope of work
April 20, 2017	PDS Management Board authorization of contract
April 24, 2017	Notice to proceed
May 2017-October 2017	Code Analysis / Diagnosis Complete / Present Findings
October 2017-????	Ongoing assistance as needed

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 E-mail: zoningreview-rfp@pdskc.org

ATTACHMENT A

EVALUATION SCORING SHEET

#1 Understanding of Project – An understanding of the type of project work to be performed and a plan to complete the work should be clearly demonstrated.
(35% - 35 Points)

Notes:

Score: _____/35

#2 Capacity of the Firm to Accomplish the Required Services on Schedule and within Budget – The firm must demonstrate an ability to complete projects within specified completion dates and budget.
(25% - 25 points)

Notes:

Score: _____/25

#3 Professional Qualifications – The education, training, registration, and amount of relevant experience of the proposed key project personnel
(15% - 15 Points)

Notes:

Score: _____/15

#4 Past Performance – Past performance of work on similar or comparable planning and development regulation contracts that have been successfully adopted and implemented should be demonstrated, including the ability to understand and incorporate zoning and development tools that address unique local issues. Include references and letters of commendation with a focus on zoning ordinances incorporating graphics, and internet/mobile-based platforms
(15% - 15 Points)

Notes:

Score: _____/15

#5 Specialized Experience and Technical Competence – The firm’s specialized experience and technical competence on similar projects, including the effectiveness of the proposed project team to address unique local issues at a detailed level, and incorporating appropriate community engagement processes (management structure and coordination of disciplines, offices and/or subcontractors).
(5% - 5 Points).

Notes:

Score: _____/5

#6 Design Quality Assurance – The team’s quality control processes and management approach that will be used on the project
(5% - 5 Points)

Notes:

Score: _____/5

TOTAL SCORE: _____/100