

# REQUEST FOR PROPOSALS (RFP)

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## BOONE COUNTY INDIANA UNIFIED MULTI-JURISDICTIONAL COMPREHENSIVE PLAN

DATE ISSUED:	November 7, 2024
DEADLINE FOR PRE-SUBMISSION QUESTIONS:	November 15, 2024 – 4:00pm
PRE-SUBMISSION MEETING (IF NECESSARY):	November 26, 2024
RESPONSES TO PRE-SUBMISSION QUESTIONS:	November 27, 2024
SUBMISSION DEADLINE AND TIME:	December 2, 2024 – 12:00pm
NOTIFICATION OF FINALISTS:	December 5, 2024
FINALIST INTERVIEWS:	December 10 and/or 12, 2024
CONSULTANT SELECTION:	December 13, 2024
CONTACT INFORMATION:	Boone County Area Plan Commission Boone County Office Building 116 W Washington St Suite 101 Lebanon, IN 46052 <a href="mailto:areaplantdirector@co.boone.in.us">areaplantdirector@co.boone.in.us</a>

# **TABLE OF CONTENTS**

1.00	INTRODUCTION .....	4
1.1	PURPOSE OF PROCUREMENT.....	4
1.2	EXPLANATION OF PARTIES INVOLVED.....	4
1.3	BACKGROUND .....	5
1.4	FUNDING.....	5
1.5	CONTRACT AWARD.....	5
2.0	SCOPE OF SERVICES .....	6
2.1	GENERAL SUMMARY OF SERVICES.....	6
2.2	TASK I – PLAN DEVELOPMENT.....	6
	PLAN ADMINISTRATION .....	6
	PLAN COORDINATION .....	6
	DELIVERABLES:.....	7
2.3	TASK II: COMMUNITY PROFILES .....	7
	DATA COLLECTION & REVIEW.....	7
	EXISTING & FUTURE CONDITIONS .....	7
	DELIVERABLES:.....	8
2.4	TASK III: PUBLIC & STAKEHOLDER ENGAGEMENT.....	8
	STAKEHOLDER INTERVIEWS.....	8
	PUBLIC ENGAGEMENT .....	8
	DELIVERABLES:.....	9
2.5	TASK IV: PRIORITIES AND IMPLEMENTATION.....	9
	DELIVERABLES:.....	9
2.6	TASK V: PLANS DOCUMENTATION AND ADOPTION.....	10
	DELIVERABLES:.....	10
3.0	RFP TERMS AND CONDITIONS.....	11
3.2	REQUIREMENTS AND FORMS.....	11
3.3	CONFIDENTIAL INFORMATION .....	11
3.4	QUESTIONS AND PRE-PROPOSAL MEETING REQUEST .....	11
3.5	ADDENDA TO SOLICITATION / POSTPONEMENT OF SUBMISSION DEADLINE.....	12
3.6	PROPOSALS DELIVERY PROCEDURES.....	12
3.7	WITHDRAWAL OF PROPOSALS.....	12

3.8	MODIFICATION OF PROPOSALS.....	13
3.9	PROPOSALS OPENING PROCEDURES .....	14
3.10	EVALUATION FORM AND RANKING .....	14
3.11	RESERVED RIGHTS.....	14
3.12	PERSONNEL.....	14
3.13	KNOWLEDGE OF CONDITIONS .....	14
3.14	NO GEOGRAPHIC PREFERENCE .....	14
3.15	CONFLICTS OF INTEREST .....	15
3.16	CONTRACTUAL RELATIONSHIPS .....	15
3.17	RESPONSIBILITY FOR COMPLIANCE WITH LEGAL REQUIREMENTS.....	15
3.18	MATERIALS AND EQUIPMENT .....	15
3.19	PROTESTS PROCEDURES .....	15
4.0	INSTRUCTIONS FOR COMPLETE PROPOSALS.....	16
4.1	GENERAL .....	16
4.2	LETTER OF TRANSMITTAL .....	16
4.3	TABLE OF CONTENTS.....	16
4.4	EXECUTIVE SUMMARY OF THE SCOPE OF WORK.....	16
4.5	PERSONNEL RESUMES.....	16
4.6	PROPOSER QUESTIONNAIRE.....	16
4.7	FEE PROPOSAL TEMPLATE FORM.....	16
4.8	SCHEDULE PROPOSAL TEMPLATE FORM.....	16
4.9	ADDITIONAL SUPPORTING MATERIALS.....	16
	ATTACHMENT A - EVALUATION SHEET.....	17
	ATTACHMENT B - PROPOSER QUESTIONNAIRE.....	18
	ATTACHMENT C – COST PROPOSAL FORM TEMPLATE .....	21
	ATTACHMENT D – PROJECT SCHEDULE TEMPLATE.....	22
	Tasks for the Unified Multi-Jurisdictional Comprehensive Plan.....	22

# **1.00 INTRODUCTION**

## **1.1 PURPOSE OF PROCUREMENT**

The Boone County Area Plan Commission is issuing a Request for Proposals (RFP) from responsible, responsive, and qualified consulting firms to provide multi-jurisdictional Comprehensive Planning services for the unincorporated areas of Boone County and the Town of Advance.

The Comprehensive Plan will be the foundational element that sets the communities up for success by establishing a cohesive long-term vision to guide future growth and serve as a framework to position the communities to apply for state and federal grants for which they may be eligible upon adoption of their plans. The purpose of this project is to update the county's 2009 Comprehensive Plan and to identify a community's contemporary assets and challenges, establish a new vision, and create an actionable plan for the communities to achieve their goals. All aspects of the plans must be in compliance with Indiana Code 36-7-4-500.

## **1.2 EXPLANATION OF PARTIES INVOLVED**

The Boone County Council will be the fiscal agent providing the funds for the hiring of a consultant to assist Boone County and the Town of Advance in the preparation of the plans.

The Executive Director of the Boone County Area Plan Commission will be the primary point of contact and who will manage the overall project, coordinate efforts with the County and the Town, oversee the day-to-day interaction with the consultant team, and coordinate activities of the Steering Committee.

The Steering Committee will be a broad group of multi-jurisdictional stakeholders who will provide guidance and local knowledge throughout the planning process.

Area Groups will be group(s) of stakeholders throughout the county who will provide guidance and local knowledge throughout the planning process for their community or area of concern. This is intentionally left broad to allow consultants to propose the best structure and approach to ensuring each group is actively engaged in the planning process. (See the current Comprehensive Plan for the Area Groups that have been engaged in previous planning efforts.)

### **1.3 BACKGROUND**

Boone County completed their current Comprehensive Plan in 2009. The full plan can be found at [Area Plan Commission Comprehensive Plan - Boone County, Indiana](#). The previous County Comprehensive Plan was adopted in 1998 and provided a broad framework for the future of a largely agricultural area. Not only has the jurisdictional area of the 2009 Comprehensive Plan changed, but the new LEAP Lebanon Innovation District (9,000+ acre state of the art industrial park project) and the regulation of renewable energy sources have created new challenges in the county.

In addition to the unincorporated area of Boone County and the participating Town of Advance, it is expected that the City of Lebanon and the Towns of Jamestown, Thorntown, Whitestown, and Zionsville will also provide input into the development of this new Comprehensive Plan. Comprehensive Plans are available for review on their respective city/town websites.

Existing Comprehensive Plans for these communities:

### **1.4 FUNDING**

Financial support for this contract is provided through the Boone County Council. The project budget has been established as a not-to-exceed amount of \$100,000.00.

### **1.5 CONTRACT AWARD**

The successful Proposer will be required to execute a professional services contract with the Boone County Area Plan Commission. The Consultant will need to have an understanding of Indiana State law and requirements for comprehensive plans while also understanding the Boone County community as a whole. Boone County reserves the right, in its sole discretion, to discontinue and terminate the professional services contract at any time, with or without cause.

## **2.0 SCOPE OF SERVICES**

### **2.1 GENERAL SUMMARY OF SERVICES**

Boone County will undertake the development of a unified multi-jurisdictional comprehensive plan for the unincorporated areas as well as the Town of Advance. A successful project will create a shared vision for future growth and development, encompass meaningful and inclusive public engagement, identify stakeholders, establish clear guidance with a user-friendly document and establish achievable implementation plans. The content of the plans will be informed by and based on significant community input and conversations involving a variety of innovative and effective outreach methods. The following sections provide preliminary tasks to help guide Consultants. The tasks are intentionally broad to allow Consultants an opportunity to propose innovative approaches and/or best practices to guide the full scope of work.

### **2.2 TASK I – PLAN DEVELOPMENT**

#### **PLAN ADMINISTRATION**

Throughout the course of the project, the Consultant team will be responsible for coordinating activities with the Executive Director and the Steering Committee. These activities will include regular consultation with the Executive Director, preparing minutes for all project-related meetings, coordinating additional informal meetings (interviews) with stakeholders, participating in conference calls, and responding to requests for information. The Consultant will also be responsible for internal quality assurance/quality control procedures, monitoring project budgets and schedules, and preparing invoices and monthly progress reports that will be sent to the Executive Director. The Consultant will designate a project manager who will be the single point of contact for the plan and who will work closely with the Executive Director, Steering Committee, and others as appropriate to the work required. The Consultant team, including any subconsultants, and their relevant experience to the project shall be included in the proposal.

#### **PLAN COORDINATION**

Prior to the Plan Kickoff Meeting, the Consultant will work with Executive Director and the Steering Committee to establish a schedule that fits the community's needs and identifies key stakeholders that should be actively involved in the process. It is expected that Project Kickoff Meeting will include the Steering Committee and other identified stakeholders and will be held shortly after the Consultant is given the Notice to Proceed. The Consultant will facilitate the Plan Kickoff Meeting with the Steering Committee to begin the project and gather information on existing conditions. At this meeting, the Steering Committee will decide how stakeholders should be involved and how best to engage them in the process. Also, the Consultant will equip the Steering Committee to identify the community's strengths and challenges and discuss the best approach to develop the public engagement plan and the overall communication strategy.

Informal meetings between the Consultant and stakeholders are to be expected as well. The Consultant will have at least two staff members at each formal Steering Committee meeting. The Consultant will prepare agendas and other materials, facilitate discussion, and prepare minutes for each meeting. All Steering Committee meetings will be held at a location that is convenient to the team, the date, time, and location of which will be coordinated by the Executive Director in conjunction with the Steering Committee members. In addition to the Steering Committee

meetings, the Consultant will participate in the public engagement activities outlined in Task 3 of this scope of work. Informal project meetings may occur as needed, either in person, or via phone. This is considered incidental to the study.

**DELIVERABLES:**

- Monthly Status Reports
- Project Invoices
- Meeting Materials (handouts, agendas, maps, etc.)
- Meeting Minutes
- Overall communication strategy

## **2.3 TASK II: COMMUNITY PROFILES**

### **DATA COLLECTION & REVIEW**

The Consultant and the Executive Director will review existing plans and studies, analyze existing conditions and trends, and create a baseline understanding of Boone County and the communities. This is an important part of the process in order to get the consultant familiar with local issues and situations. The Consultant shall consider developing and presenting any practical benchmarking for the County. The benchmarks should be assessable with either existing data or data obtained through the project. To manage cost and leverage the maximum benefit for the planning process the Executive Director and their Staff will provide assistance to the Consulting team on data collection and analysis.

### **EXISTING & FUTURE CONDITIONS**

Upon completion of data collection & review activities, the Consultant will evaluate the existing and future conditions in Boone County and its communities. Subject matters that should be analyzed include but not limited to:

- Land Use
- Government and Fiscal Capacity
- Public Facilities and Services
- Placemaking
  - Community Wellness
  - Culture & Community Character
  - Education
- Economic Development
- Housing
- Transportation
- Agriculture
- Natural Resources
- Renewable Energy Sources
- Parks and Recreation
- Trails
- Main Street & Downtown Revitalization
- Historic and Archaeological Resources
- Hazard Mitigation
- Utilities and Infrastructure including Broadband & Internet Access/Capacity

Based on the list above, the Steering Committee desires extra focus be placed on the following subject matters:

1. Utilities and other infrastructure
2. Renewable Energy Sources
3. Housing
4. Economic Development
5. Land Use

The Consultant will facilitate the Steering Committee through developing a Vision and establishing Core Values for the communities. The Vision will capture the distinctive qualities of the communities while pushing them to dream for a better future. The Core Values reminds the communities what is most important to all the residents so that as changes come, and they will come, the elements that make each community who it is will always remain.

The existing and future conditions report will ideally inform Task 4.

**DELIVERABLES:**

- Data files of collected information and analysis outputs
- Benchmarks
- Narratives describing SWOT, existing and future conditions
- Charts, maps, schematics, and/or tables that might be beneficial
- Meeting Materials (handouts, agendas, maps, etc.)
- Meeting Minutes

## **2.4 TASK III: PUBLIC & STAKEHOLDER ENGAGEMENT**

### **STAKEHOLDER INTERVIEWS**

The Consultant will conduct conversations (individual interviews and/or focus group workshops) with stakeholders and Area Groups to gauge their current conditions, challenges, and needs. These are informal with an emphasis to increase the Consultant's local knowledge of the prominent issues and to make sure key stakeholder's concerns are addressed during the planning process.

### **PUBLIC ENGAGEMENT**

Community engagement through the planning process is a critical element of its success. Strong and innovative citizen engagement and community education will be critical to this planning process. The Consultant will use the information collected from the Project Kickoff Meeting to finalize the public engagement plan. During this phase of the planning process, the Consultant will begin public engagement by conducting a public survey or other outreach opportunities, such as an Open House or Pop-up Events in each participating community. The Consultant will collaborate with the Steering Committee to devise the most appropriate approach.

Additional Steering Committee meetings may be needed to report on public and stakeholder engagement. Overall, this task focuses on the development of materials and information to inform stakeholders and the public about the planning process. The consultant will provide for broad and diverse.



community involvement throughout the project including public surveys, pop-up events, etc. In order to effectively engage and educate stakeholders plus citizens the Consultant team will need to utilize innovative and effective outreach methods throughout the planning process.

Proposing firms should demonstrate experience in innovative ways to engage stakeholders and the public throughout the comprehensive planning process. The proposal must address how the consultant intends to approach public engagement with a specific emphasis on how the engagement will occur in each community and the likely outcome from the specific method.

**DELIVERABLES:**

- Public Engagement Plan
- Compilation of stakeholder comments and input
- Compilation of public comments and input
- Meeting Materials (handouts, agendas, maps, etc.)
- Meeting Minutes

**2.5 TASK IV: PRIORITIES AND IMPLEMENTATION**

The concluding output from the planning process will be a set of priorities to guide Plan implementation for the communities. The Consultant will develop the priorities to address the conditions identified in Task II. Each priority should be presented along with example projects or initiatives to provide guidance for future decision-making. The priorities will also identify immediate, short, and long-term action items/projects.

The priorities should support the goals and the overall Vision for the plans, as well as align with any benchmarks determined in Task II.

Proposing firms are encouraged to propose innovative approaches to identifying next steps and providing accountability. The proposal must address how the consultant intends to approach implementation to achieve the vision of these multiple plans.

**DELIVERABLES:**

- Executive Summary that will summarize the plans and proposed priorities
- List and narrative of priorities and corresponding examples of projects and initiatives
- Recommendations & Implementation Plans
- Other items, as proposed by Consultant
- Meeting Materials (handouts, agendas, maps, etc.)
- Meeting Minutes

## **2.6 TASK V: PLANS DOCUMENTATION AND ADOPTION**

The Consultant shall compile all components of the tasks listed above into the final plan. The plan should be developed with an emphasis on high-quality visual aids throughout the documents. The draft plan shall be presented to the Steering Committee and stakeholders. It is expected that the draft reports will be provided to the Steering Committee and stakeholders in electronic format only, with hard copies of the draft reports available upon request.

Once the draft plan is reviewed, it is ready to be released to the public. The Steering Committee and the selected consultant will discuss the most effective way to engage the public during a 30-day comment period. One possible method of outreach may include multiple public open houses to provide the public with an opportunity to comment on the draft plan. Alternative forms of outreach will be evaluated to ensure all community residents has the opportunity to provide their comments. This is an opportunity for the Steering Committee to build excitement for the implementation of the plan and make sure it reflects the aspirations of the community.

Following the public comment period, the Consultant will make any changes to the plan based on the public and Steering Committee feedback. The plan will go before the Boone County Area Plan Commission for adoption and the appropriate legislative bodies for enactment. The Consultant will provide printed copies of the plans and assist in the adoption process.

The final plan shall be submitted in both paper and electronic formats. The electronic versions of the reports should be submitted in a format that can be easily uploaded to websites for review by stakeholders and by the public. All hard copies of the final reports shall be bound, printed in color on high quality paper, and will have a plastic or laminated front and back cover. Twenty (20) hard copies of the final reports will be provided upon completion of the study. Electronic copies on flash drives shall be included with each hard copy report. A reasonable number of additional flash drives shall be provided as well.

### **DELIVERABLES:**

- Final Plans - one for county, one for the participating community (hard copy, editable electronic copy, and PDF electronic copy)
- Flash drives included with the hard copies of the reports
- Meeting Materials (handouts, agendas, maps, etc.)
- Meeting Minutes

## **3.0 RFP TERMS AND CONDITIONS**

### **3.1 RFP DEADLINE**

Proposals submitted in response to this solicitation must be received by the Area Plan Commission by 12:00pm on Monday, December 2, 2024. Without exception, proposals received after the submission deadline will not be evaluated.

### **3.2 REQUIREMENTS AND FORMS**

Each firm must submit five (5) hard copies and one (1) electronic copy of their proposal in accordance with section 3.1 RFP Deadline. Proposals must include all supporting materials that describe or display other qualifications or unique skills a firm may possess that are relevant to this RFP. Supporting materials shall be submitted with five (5) copies. Section 4.0 Complete Proposals describes a complete proposal package and all necessary documents to be considered. Failure to submit a complete proposal or changing any of the attachments provided will result in disqualification of the proposal. All attachments must be completed; in particular, Attachment B must be signed to be considered for an award.

### **3.3 CONFIDENTIAL INFORMATION**

Proposers are advised that materials contained in proposals are subject to the Indiana Public Records Act, IC 5-14-3 et. seq. and may be viewed and/or copied by any member of the public, including news agencies and competitors. Proposers claiming a statutory exception to the foregoing must place all confidential documents (including the requisite number of copies) in a sealed envelope clearly marked "Confidential" and must indicate in the transmittal letter and on the outside of that envelope that confidential materials are included. The Proposer must also specify which statutory exception applies. The Area Plan Commission reserves the right to make determinations of confidentiality. If the Area Plan Commission does not agree that the information designated is confidential under one of the disclosure exceptions to the Indiana Public Records Act, it may either reject the qualification or discuss its interpretation of the allowable exceptions with the Proposer. If agreement can be reached, the proposals will be considered. If agreement cannot be reached, the Area Plan Commission will remove the proposals from consideration for award and return the proposals to the Proposer.

### **3.4 QUESTIONS AND PRE-PROPOSAL MEETING REQUEST**

Proposers may submit questions by e-mail to the Executive Director at [areaplndirector@co.boone.in.us](mailto:areaplndirector@co.boone.in.us), with the subject line, "Boone County Comprehensive Plan RFP Questions" by 4:00pm on November 15, 2024. Based on the quantity and complexity of questions received, a pre-proposal meeting for the purpose of clarifying and answering questions on the RFP may be offered. In addition, any Proposer may request a pre-proposal meeting be held. To request a pre-proposal meeting, Proposers must formally submit an email request by 4:00pm on November 15, 2024. If the Executive Director does not receive any request for a pre-proposal meeting by the deadline or determines a meeting is not necessary, then no pre-proposal meeting will be held. If a meeting is requested by at least one Proposer, a meeting will be held on the afternoon of November 26, 2024, or virtually and open for all Proposers to attend. If a pre-proposal meeting is scheduled, a notification will be posted to the Boone County Area Plan Commission website at <https://boonecounty.in.gov/Offices/Area-Plan/> and emailed to Proposers for which a question or meeting request was received and those who previously expressed interest in the solicitation.

Responses to all written questions received by the Executive Director and/or verbal discussions at a pre-proposal meeting will be provided to all Proposers no later than 4:00pm on November 27, 2024, via email and posting to the Boone County Area Plan Commission at <https://boonecounty.in.gov/Offices/Area-Plan/>. In the case of any discrepancy between verbal answers given at the pre-proposal meeting and that confirmed in writing, the written answer by way of an additional notification shall prevail.

Non-attendance at the pre-proposal meeting or a decision not to raise any questions in relation to this RFP will not be a cause for disqualification of a Proposer and/or individual. Proposers shall not rely on oral statements. Oral statements will not be binding. Please do not call the Executive Director or their office to request information. Only questions sent to the Executive Director at [areaplndirector@co.boone.in.us](mailto:areaplndirector@co.boone.in.us) with the subject line, "Boone County Comprehensive Plan RFP Questions" will receive a response.

### **3.5 ADDENDA TO SOLICITATION / POSTPONEMENT OF SUBMISSION DEADLINE**

The Area Plan Commission reserves the right to revise or amend the RFP up to the date and time set for the submission of responses. Such revisions and amendments, if any, shall be announced by written addenda to the RFP. If an addendum significantly changes the RFP, the date set for the submission may be postponed by such number of days as in the opinion of the Area Plan Commission shall enable potential Proposers to revise their proposals. In any case, the submission deadline shall be at least five (5) business days after the last addendum, and the addendum shall include an announcement of the new date, if applicable, for the submission of proposals.

Upon issuance, addenda will be considered part of the RFP and will prevail over inconsistent or conflicting provisions contained in the original RFP. Copies of all addenda will be made available on the Boone County Area Plan Commission website at <https://boonecounty.in.gov/Offices/Area-Plan/>.

### **3.6 PROPOSALS DELIVERY PROCEDURES**

Sealed proposals shall be delivered to the Area Plan Commission office at the address below, no later than 12:00pm on December 2, 2024.

Boone County Area Plan Commission  
Attention: Boone County Comprehensive Plan RFP  
Boone County Office Building  
116 W Washington Street  
Suite 101  
Lebanon, IN 46052

Sealed envelopes shall be clearly labeled "Boone County Comprehensive Plan RFP" with the firm's name and address clearly indicated. Once a proposal is received by the Executive Director, it will be time and date stamped. Proposals received after the specified date and time will not be considered. Additionally, the Area Plan Commission will not consider any proposal submitted via fax, email, or verbally.

### **3.7 WITHDRAWAL OF PROPOSALS**

A written request for the withdrawal of a proposal may be granted if the request is received by the Executive Director prior to the time of award.

### **3.8 MODIFICATION OF PROPOSALS**

Except at the written request of the Area Plan Commission, no proposal may be modified after the deadline for proposal submission.

### **3.9 PROPOSALS OPENING PROCEDURES**

The opening of all proposals shall commence immediately after the stated delivery date and time at the Office of the Boone County Area Plan Commission to ensure they are complete. The proposals shall be distributed for review at that time.

### **3.10 EVALUATION FORM AND RANKING**

An Evaluation Committee will review and rank all proposals based on the criteria outlined in the Evaluation Sheet, provided as Attachment A. The review and ranking will be done individually and without consultation with other members of the Evaluation Committee. The evaluation committee will consist of individuals who will review each proposal based on the criteria for this RFP. During the evaluation period, the Evaluation Committee reserves the right to interview some or all of the responding firms. A recommendation for award will be made to the Area Plan Commission who will make a final selection and forward to the Area Plan Commission's General Counsel for review. All firms will be notified regarding the award.

### **3.11 RESERVED RIGHTS**

The Area Plan Commission reserves the right, at any time and for any reason, to cancel this RFP, to reject any or all proposals. The Area Plan Commission reserves the right to develop criteria for each proposal package. The Area Plan Commission reserves the right to waive any immaterial defect in any proposals. The Area Plan Commission may seek clarification from a Proposer at any time and failure to respond within a specified timeframe is cause for rejection.

### **3.12 PERSONNEL**

The firm represents that they will secure, at their own expense, all personnel required to provide the services under the contract. Such personnel shall not be employees of or have any contractual relationship with the Area Plan Commission. All the services required hereunder will be performed by the firm or under its supervision, and all personnel engaged in the work shall be fully qualified and shall be trained, authorized and/or licensed, if applicable, under state and local law to perform such services. None of the work or services covered by the contract shall be sub-contracted without prior written approval by Area Plan Commission.

### **3.13 KNOWLEDGE OF CONDITIONS**

Proposer shall thoroughly examine and be familiar with the contract documents, scope of work and all conditions and requirements that may in any manner affect the work to be performed under the contract. The submission of a proposal shall constitute an acknowledgement that the Proposer has thoroughly examined and is familiar with the contract documents, scope of services, conditions, and requirements in every detail. The Area Plan Commission will not adjust the contract value on the basis of a Proposer's lack of knowledge of conditions.

### **3.14 NO GEOGRAPHIC PREFERENCE**

This procurement will be conducted in a manner that prohibits the use of statutorily or administratively imposed in-State or local geographic preferences in evaluation of proposals or award of contracts, except where Federal statutes expressly mandate or encourage geographic preference. This does not preempt State licensing laws.

### **3.15 CONFLICTS OF INTEREST**

Area Plan Commission employees engaged in the award and administration of contracts, or any person acting on their behalf, are prohibited from accepting, directly or indirectly, any gifts whatsoever, from any person with whom the employee interacts on official Area Plan Commission business. Therefore, the firm may not make gifts or favors to any Area Plan Commission employee or county staff member.

### **3.16 CONTRACTUAL RELATIONSHIPS**

The Area Plan Commission intends to execute a Professional Services Contract for the provision of the required services with the selected firm. The firm's contractual responsibility must rest solely with one firm or legal entity, which shall not be a subsidiary or affiliate with limited resources.

The Area Plan Commission will not be a party to agreements between the firm and/or any sub-contractors it may choose to employ during fulfillment of the contract; however, the Firm shall execute fair and reasonable agreements with its sub-contractors (if any) and shall provide the Executive Director with copies of said agreements not later than ten (10) business days prior to their execution.

### **3.17 RESPONSIBILITY FOR COMPLIANCE WITH LEGAL REQUIREMENTS**

Proposer's services shall be in full compliance with any and all applicable federal, state, and local laws, regulations, ordinances, and standards regardless of whether or not they are referred to in this RFP.

### **3.18 MATERIALS AND EQUIPMENT**

The selected firm shall at its own expense furnish all labor, supplies, and materials necessary to provide the services required by the contract, unless otherwise indicated in the Scope of Work.

### **3.19 PROTESTS PROCEDURES**

The Area Plan Commission has developed procurement protest procedures to handle and resolve any disputes relating to the procurement process. Protests must be in written form. The Executive Director will provide a copy of the protest procedures and a protest form, via e-mail or by fax, upon request. No verbal protest complaints will be addressed.

## **4.0 INSTRUCTIONS FOR COMPLETE PROPOSALS**

### **4.1 GENERAL**

Each Proposer must submit five (5) hard copies and one (1) electronic copy (i.e., CD or flash drive) of its proposals to the Area Plan Commission address identified in Section 3.6 *Proposals Delivery Procedures*. Failure to submit a complete proposal or changing any of the provided attachments may result in disqualification of the proposals. Please note, unnecessarily elaborate or voluminous responses are neither required nor wanted. The content and sequence to be considered a complete proposal shall be as follows:

### **4.2 LETTER OF TRANSMITTAL**

Include Respondent's basic understanding of the work to be performed. In addition, clearly articulate why your firm believes it to be the best qualified to perform the services requested. Transmittal letters shall not exceed two (2) pages.

### **4.3 TABLE OF CONTENTS**

Include a clear identification of the material by section and by page number.

### **4.4 EXECUTIVE SUMMARY OF THE SCOPE OF WORK**

Proposers must provide an overview of the major features of the RFP submission. Include any suggestions, conclusions, recommendations, or assumptions the Proposer believes are significant to the understanding of the RFP.

### **4.5 PERSONNEL RESUMES**

Include resumes and backgrounds of all key personnel the Proposers would be assigning. Please make sure to indicate the primary point of contact for the consultant.

### **4.6 PROPOSER QUESTIONNAIRE**

Attachment B is the Proposer Questionnaire and is required. All pages of the questionnaire must be completed. Please make sure to sign Attachment B.

### **4.7 FEE PROPOSAL TEMPLATE FORM**

Attachment C is the Fee Proposal Template Form and Proposers may utilize it to outline the cost of the proposal. Proposers may attach necessary information to support the information requested.

### **4.8 SCHEDULE PROPOSAL TEMPLATE FORM**

Attachment D is the Schedule Proposal Template Form and Proposers may utilize it to outline the cost of the proposal. Proposers may attach necessary information to support the information requested.

### **4.9 ADDITIONAL SUPPORTING MATERIALS**

Additional supporting materials may be included as an Appendix. Proposals must include all supporting data/materials that describe or display other qualifications or unique skills a Proposer may possess that are relevant to this project. Supporting materials shall be submitted with five (5) hard copies.



# **ATTACHMENT A - EVALUATION SHEET** *FOR INTERNAL USE - COMPANIES DO NOT COMPLETE*

COMPANY NAME: \_\_\_\_\_

## **GUIDELINES FOR COMPANY SELECTION**

**YES / NO**      **Are all items requested in the proposal package provided? If not, do not complete the rest of this form.**

**0-20 Pts** \_\_\_\_\_ **Technical Expertise** – Qualifications and experience of key team members assigned.

**0-10 Pts** \_\_\_\_\_ **Capacity** – Evaluation of the consultant’s ability to provide service.

**0-25 Pts** \_\_\_\_\_ **Proposed Project Approach** – How well the Consultant addressed key tasks within the Project Scope referenced in their proposal and an evaluation of the Consultant’s approach to the project.

**0-20 Pts** \_\_\_\_\_ **Public Engagement Approach** – Consultant demonstrates a plan and the ability to achieve robust, inclusive, and meaningful public engagement throughout the project.

**0-10 Pts** \_\_\_\_\_ **References** – Examples of previous governmental work that references provide satisfaction in services they received. Three satisfactory references is worth 10 points, two references 5 points, one reference 2 points, and no satisfactory references is worth 0 points.

**0-15 Pts** \_\_\_\_\_ **Specialized Work Experience** – Working knowledge of State of Indiana laws governing comprehensive plans and comprehensive planning experience with counties and multiple jurisdictions.

\_\_\_\_\_ **Total Points** – 100 possible points

COMMENTS: \_\_\_\_\_

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\_\_\_\_\_

Date: \_\_\_\_\_ Evaluation Committee Member Name: \_\_\_\_\_

Signature: \_\_\_\_\_

# ATTACHMENT B - PROPOSER QUESTIONNAIRE

## 1. Company Details

Company Name: \_\_\_\_\_

Contact Person & Title: \_\_\_\_\_

Company Address: \_\_\_\_\_

E-mail Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Company website: \_\_\_\_\_

Taxpayer Identification Number: \_\_\_\_\_

Indicate which of the following apply:

- Corporation
- Partnership
- Sole Proprietor
- Small Business
- Disadvantaged Business Enterprise (DBE)
- Member of the Indiana State Bar Association? \_\_\_\_\_

## 2. Please provide three (3) customer references.

Each local government reference must have used your company for planning services in the past five years. References that have no knowledge of your company's expertise, references that refuse to answer questions or provide information, or references that cannot be reached after three attempts, will not be considered as having met the satisfactory reference requirement.

Government Name: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Dates of Project: \_\_\_\_\_

Describe Service: \_\_\_\_\_

Government Name: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Dates of Project: \_\_\_\_\_

Describe Service: \_\_\_\_\_

Government Name: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Dates of Project: \_\_\_\_\_

Describe Service: \_\_\_\_\_

**3. Provide a brief summary of your firm’s history and organizational structure.**

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**4. Describe specific plans for how you will manage, control, and supervise the planning process involving multiple jurisdictions in order to ensure satisfactory provision of services.**

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**5. Provide a brief summary of current workload and consultant’s availability over the period of the next 12 months.**

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**6. Provide a brief summary of your firm’s experience and expertise in comprehensive planning for local governments, and in particular, involving the development of multi- jurisdictional plans.**

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**7. Provide a brief summary of prior work with a county with multiple jurisdictions, including capacity to manage a project steering committee.**

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**8. Highlight innovative approaches your firm will take to engage the public in this comprehensive plan. Also, highlight virtual or socially distanced public engagement strategies your firm has successfully used.**

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**9. Describe which aspects of the project would involve sub-consultants, if any, and include the name, role, and resumes of key sub-consulting staff who will be assigned to this project.**

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**CERTIFICATION**

I certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a proposal for the same services, materials, supplies, or equipment, and is in all respects fair and without collusion or fraud. I understand collusive bidding is a violation of State and Federal law and can result in fines, prison sentences, and civil damage awards.

I hereby certify that the responses to the above representations, certifications, and other statements are accurate and complete. I agree to abide by all conditions of the Request for Proposals and certify that I am authorized to sign for the Proposer.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Printed Name \_\_\_\_\_ Title \_\_\_\_\_

# **ATTACHMENT C – COST PROPOSAL FORM TEMPLATE**

Please Note: The following template is a guideline for the providing estimated project cost. Tasks and sub-tasks should match the groupings on the Project Schedule Template.

## **Tasks for the Unified Multi-Jurisdictional Comprehensive Plan**

### **Task I – Plan Development**

<b>Sub-Task</b>	<b>Costs</b>	<b>Notes</b>
Sub-task #1		
Sub-task #2		
Sub-task #3		
Sub-task #4		

### **Task II – County Profile**

<b>Sub-Task</b>	<b>Costs</b>	<b>Notes</b>
Sub-task #1		
Sub-task #2		
Sub-task #3		
Sub-task #4		

### **Task III – Public & Stakeholder Engagement**

<b>Sub-Task</b>	<b>Costs</b>	<b>Notes</b>
Sub-task #1		
Sub-task #2		
Sub-task #3		
Sub-task #4		

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# **ATTACHMENT D – PROJECT SCHEDULE TEMPLATE**

Please Note: The following template is a guideline for the proposed Project Schedule section of the submitted proposals. Tasks and sub-tasks should match the groupings on the cost proposal form. Assume a start date of #DATE when preparing the schedule. The final schedule will be developed in consultation with the #Executive Director and the Steering Committee.

## **Tasks for the Unified Multi-Jurisdictional Comprehensive Plan**

### **Task I – Plan Development**

Sub-Task	Date	Notes
Sub-task #1		
Sub-task #2		
Sub-task #3		
Sub-task #4		

### **Task II – Community Profile**

Sub-Task	Date	Notes
Sub-task #1		
Sub-task #2		
Sub-task #3		
Sub-task #4		

### **Task III – Public & Stakeholder Engagement**

Sub-Task	Date	Notes
Sub-task #1		
Sub-task #2		
Sub-task #3		
Sub-task #4		

### **Task IV – Priorities & Implementation**

Sub-Task	Date	Notes
Sub-task #1		
Sub-task #2		
Sub-task #3		
Sub-task #4		

### **Task V – Plans Documentation & Adoption**

Sub-Task	Date	Notes
Sub-task #1		
Sub-task #2		
Sub-task #3		
Sub-task #4		