



ZEBULON

NORTH CAROLINA

REQUEST FOR QUALIFICATIONS

Comprehensive Economic Development Strategy

Town of Zebulon

1003 N. Arendell Avenue
Zebulon, NC 27597

Phone (919) 823-1874
Email sjohnson@townofzebulon.org

Requested Work:

The Town of Zebulon is seeking a partner firm to create the Town's first comprehensive economic development strategy. The document will establish an economic baseline, market context, and a clear vision including overarching economic goals, objectives, actions, and measurables to determine success.

ISSUED BY:

Town of Zebulon
1003 N. Arendell Avenue
Zebulon, NC 27597

POSTED:	April 21, 2023
RFQ QUESTIONS:	May 5, 2023
RESPONSES	: May 12, 2023
PROPOSALS DUE:	May 26, 2023
FINALISTS INTERVIEWS:	Early June 2023
FINAL SELECTED:	June 23, 2023

About Zebulon:

Incorporated in 1907 as a railroad town, the Town of Zebulon identifies itself with its friendly small-town character, rich heritage, traditional downtown, events at Five County Stadium, and beautiful parks, and natural resources. Zebulon is conveniently located in the rapidly growing Triangle region of North Carolina, with access and proximity to major corridors such as US 264, US-64, I-87, and future I-587. Home to an estimated population of 10,000, Zebulon is experiencing substantial growth as part of the second fastest growing County in the United States.

Zebulon has a diverse range of attractions including major employers comprised of GSK Pharmaceuticals, US Foods, Nomaco, local business establishments, Historic Wakelon School (now serves at Town Hall), and Five County Stadium, situated at the eastern edge of the Town where Wake converges with Franklin, Wilson, and Johnston Counties. Residential growth is also spurring investment in downtown, business expansions, the development of service businesses, and in response, the adoption of new plans. These town plans provide guidance for how growth should be managed.

[Town of Zebulon Vision 2030 Strategic Plan](#)

[Comprehensive Land Use Plan](#)

[Comprehensive Transportation Plan](#)

[Parks and Recreation Master Plan](#)

The strategic plan focus and goals define these three areas of interest:

- Vibrant Downtown
- Small Town Life
- Growing Smart

In developing the Economic Development Strategic Plan, these areas of interest should be considered as strategies and goals are developed.

Addressing the growth of Downtown Zebulon is important since the NC Main Street program accepted the Town for the Downtown Associate Community program in 2021 and the Town is expected to be designated as a Main Street program this summer.

Another important part of the creation of a Comprehensive Economic Development Strategic Plan for the Town is the consideration of how growth and economic success will affect the vulnerable communities of Zebulon. Defining strategies or tactics to lessen the displacement of historically underserved residents from their neighborhoods due to development will assist the Town with implementing a plan that benefits all Zebulonians.

Project Scope:



1

INTENT AND OBJECTIVES:

The main objectives of this work are to develop a comprehensive, inclusive, economic development strategy that unlocks economic opportunities in the Town and to identify strategies to mitigate the risk of the displacement of vulnerable citizens that may occur due to the growth and development of the Town.

This plan should develop strategies and actionable recommendations that are contextualized to the town's strengths and challenges with the goal of creating a more resilient economy that is inclusive of the needs and priorities of the Town citizens.

Identified areas of work:

- Analysis of economic growth potential
- Economic growth strategies
- Displacement mitigation suggestions
- Implementation action plan
- (optional) Suggested avenues to leverage funding to expand this and future study exercises.

Details of inclusion:

- Collaborate with staff to understand community issues and context through a series of virtual scoping calls.
- Creation of a 3-5-year plan with short, medium, and long-range implementation.
- Utilization of available data/information including the four (4) plans: Town of Zebulon Vision 2030 Strategic Plan, Comprehensive Land Use Plan, Comprehensive Transportation Plan, the Parks and Recreation Master Plan and the Town's Unified Development Ordinance to ensure continuity in Town plans.
- Develop stakeholder engagement strategy to touch as many groups as possible. The exact level of public engagement will be largely influenced by the consultant according to the intensity they believe should be utilized during the process.
- Collaborate with staff to co-create a storyboard outline and then script created from 1st person interviews.
- Secondary outreach engagement to share draft plan and the storyboard to gain feedback from community/stakeholders. Utilize the feedback to refine the draft for final plan development.
- Gather data relating to current and projected growth and development.
- Assess site and building inventory for strategy development.

- Include capacity assessment of town government and available resources, including staffing, partnerships, and tools along with recommendations of augmentation to ensure success.
- Project management oversight from the Town will include administration of the contract defining the scope of services along with support for gathering and generating needed data.
- Project management for the firm includes update meetings, sending regular progress reports, invoices, and work products as agreed upon in the contract.



Deliverables:

1

PLAN:

The plan will include:

- Summary report of findings including key issues and priorities.
- Detailed list of resources utilized for findings.
- Summary of results from public participation and engagement.
- Details of public engagement sessions.
- Executive Summary and 3-5-year plan including: strategies, objectives, short, medium, and long-range action items, best measurable indicators and established metrics for success along with a community storyboard for continued messaging about the importance of developing the strategic plan.
- Identify and develop methods to distribute project information and updates.
- We prefer a phased submittal that can be determined when outlining contract deliverables.

2

EXPERTISE:

The firm will present to the elected body for kick-off and final presentation and possibly upon request during the contract duration.

The firm will be available for follow-up consultation services for at least 3 months after the final report is delivered. These services will be on a fee per call/task basis.

Submittal Requirements:



Proposals should demonstrate a high level of experience, enthusiasm, and creativity along with experience developing unique, place specific economic plans for municipalities. Proposals should include the following:

1

LETTER OF INTEREST:

A signed cover letter from a principal in the lead firm (a) expressing interest in the project, (b) certifying that the firm is properly licensed to carry out the professional services described in this RFQ and (c) certifying that sufficient resources in personnel, equipment, and time are available and can be committed to this project.

2

CONSULTANT TEAM QUALIFICATIONS AND KEY PERSONNEL:

Submit the expertise of key, permanent staff that will comprise the consultant team. Also submit the title and length of service in current position, role in past projects of similar nature, and role/commitment on this project.

3

PROPOSED WORK AND TIMELINE:

Include a detailed phasing timeline with a desired start date of July 17, 2023. Include a key task list with an estimated completion time of each task with the target completion date of July 1, 2024, with a total project duration being **12 months**.

4

PROJECT EXPERIENCE AND REFERENCES:

Provide brief descriptions of three (3) projects dealing with Economic Development Strategic Plans or similar topics prepared by or under the direction of your firm. Include in your description the techniques utilized in using the strategic plan process and the outcome of the planning process. Where applicable, provide examples where municipalities of similar size or conditions, have followed your plan and successfully reached stated goals. Please also include a list of references for these projects as well as others with an emphasis on those undertaken within the last five (5) years.



Evaluation:

1

PROCESS:

- A Steering Committee comprised of any of the following: town staff, economic professionals, and other qualified professionals will review the submitted proposals based on evaluation criteria as identified below.
- Each proposal submitted within the deadline will be reviewed to ensure all required materials have been submitted according to the guidelines set forth in this RFQ.
- The qualifications of each consultant and all submitted materials will be evaluated for compliance with the requirements and conditions contained in this RFQ.
- The Steering Committee will use a pre-identified matrix to compare all applications to equitably review and score respondents across all categories.
- Three (3) to five (5) of the high-scored proposals will be invited to participate in an in-person interview and proposal presentation with a subset of the Steering Committee.
- Evaluation from the interview and presentation will be added to the existing proposal scoring and an updated, ranked list of preferred selection will determine the firm selected.

2

CRITERIA:

- Demonstrated level of multi-disciplinary experience, qualifications, experience, and professionalism for respondent firm (or team), its principals, project management team, project manager, key staff, and sub-consultants (if applicable) assigned to the project;
- Demonstrated level of professional and technical expertise and proven record in the preparation of economic development strategic plans (and other economic development plans) and place-based strategies/planning experience by the respondent firm (or team);
- Demonstrated experience in community engagement, public participation, storyboard creation and outreach as part of similar efforts with experience working with public agencies, city departments, or other regional entities as part of similar efforts;
- Demonstrated capacity and capability of the firm to perform the work within the specified timeline, scope and budget. Ability to produce project deliverables within **12 months** of the executed contract.
- Overall value of the proposal and proposed services relative to the level of creativity and innovation in the proposed approach to the project;
- Expertise and knowledge of the eastern Wake County or regional conditions;
- Level of minority and/or women participation and leadership as part of the project team;
- Experience and ability to leverage funding to expand the capacity of this study or future endeavors;
- Cost competitiveness of the application; and
- Other issues which may arise during the selection process.

3

QUESTIONS AND SUBMITTAL:

To ensure consistent response and correct information to all interested parties, potential respondents must submit all questions and requests for clarification in writing to **Shannon Johnson** Sjohnson@townofzebulon.org

All questions must be submitted by 5:00pm EST on May 5, 2023, to receive a response in advance of the solicitation closing. An addendum will be provided showing official responses to all questions submitted. Responses will be provided by 5:00pm EST on May 12, 2023. **All proposals must be submitted digitally to Sjohnson@townofzebulon.org with the formatted email title Town of Zebulon Economic Development Strategy Plan RFQ - "Submitting Organization's Name" by 11:59pm EST on May 26, 2023 to be considered for this project opportunity.**

SUPPLEMENTAL INFORMATION:

1

PROFESSIONAL SERVICES AGREEMENT:

The Town's standard form of contract for professional services will be used.

2

GENERAL COMMENTS:

- **Public Records:** Upon receipt by the Town, your Proposal is considered public record except for material that qualifies as "Trade Secret" information under North Carolina General Statute 66-152 et seq. Your Proposal will be reviewed by Town of Zebulon staff, qualified economic professionals as well as members of the general public who may submit public records requests. To properly designate material as a trade secret under these circumstances, each firm must take the following precautions: (a) any trade secrets submitted by a firm should be submitted in a separate document marked "Trade Secret - Confidential and Proprietary Information - Do Not Disclose Except for the Purpose of Evaluating this Proposal" and (b) the same trade secret/confidentiality designation should be stamped on each page of the trade secret materials contained in the document.
- In submitting a Proposal, each firm agrees that the Town may reveal any trade secret materials contained in such a response to all staff involved in the selection process and to any outside consultant to other third parties who are hired to assist in the selection process. Furthermore, each firm agrees to indemnify and hold harmless the Town and each of its officers, employees and agents from all costs, damages, and expenses incurred in connection with refusing to disclose any material that the firm has designated as a trade secret.

Any firm that designates its entire Proposal as a trade secret may be disqualified from the selection process.

3**CONDITIONS, CLARIFICATIONS, AND RESERVATIONS:**

- The Town expects to select one firm or team but reserves the right to request substitutions of sub-consultants.
- The Town reserves the sole discretion and right to reject any and all responses received with respect to the RFQ and to cancel the RFQ process at any time prior to entering into a formal agreement. The Town further reserves the right to request additional information or clarification of information provided in any response. The Town also reserves the right, but is under no obligation, to waive technicalities and informalities. The Town shall make the award as deemed in its best interest.
- A response to this RFQ should not be construed as a contract, nor indicate a commitment of any kind. The RFQ does not commit the Town to pay for costs incurred in the submission of a response to this RFQ or for any cost incurred prior to the execution of a final contract. No recommendations or conclusions from this RFQ process concerning an individual firm shall constitute a right (property or otherwise) under the Constitution of the United States or under the Constitution, case law or statutory law of North Carolina. Neither binding contract, obligation to negotiate, nor any other obligation shall be created on the part of the Town unless the Town and your firm execute a contract.
- All responses to this RFQ shall be the property of the Town.

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CONTACTS/FURTHER INFORMATION:

- The Town of Zebulon appreciates your interest in providing services for this important project. For further information or questions regarding the content of this RFQ, please contact Shannon Johnson, Sjohnson@townofzebulon.org