



**ZEBULON**

NORTH CAROLINA

# REQUEST FOR QUALIFICATIONS

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## Housing Study and Demographic Data Analysis

**Town of Zebulon**

1003 N. Arendell Avenue  
Zebulon, NC 27597

Phone (919) 823-1874  
Email [sjohnson@townofzebulon.org](mailto:sjohnson@townofzebulon.org)

## Requested Work:

The Town of Zebulon is seeking a partner firm to create the Town's first housing study and update demographic data due to the rapid growth of residents over the past five years. This study will analyze the current housing market, identify gaps, and recommend housing strategies aligned with the Town's projected demographic shifts. The report will also provide a data-driven framework to inform land use policies, developer incentives, and zoning amendments to accommodate future growth.

**ISSUED BY:**

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

<b>POSTED:</b>	April 29, 2025
<b>RFQ QUESTIONS:</b>	May 9, 2025, COB
<b>RESPONSES:</b>	May 16, 2025, COB
<b>PROPOSALS DUE:</b>	May 27, 2025, 11:59 PM
<b>FINALIST INTERVIEWS:</b>	June 10 or 11, 2025
<b>FINAL SELECTED:</b>	June 13, 2025

## 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, 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 13,000, Zebulon is experiencing substantial growth. Zebulon's population has grown by 47% in the last five years, and 1,500 homes have vested rights, ensuring future growth. The Town requires expertise to develop a housing plan that addresses the status of residents' needs and the predicted needs to accommodate the future growth trend. The following plans can assist in developing recommendations that align with the Town's vision.

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

[Economic Development Strategic Plan](#)

[Comprehensive Land Use Plan](#)

[Comprehensive Transportation Plan](#)

[Parks and Recreation Master Plan](#)

The Town's Strategic Plan focuses on these three areas of interest:

- Vibrant Downtown
- Small Town Life
- Growing Smart

These areas of interest should be considered when developing the Housing Study and Demographic Data Analysis. The study should provide data about housing needs at different incomes and for several large employers. Utilizing this data about current residents and predicting future growth will assist the Town with implementing a plan that benefits all Zebulonians.



## Project Scope:

1

### INTENT AND OBJECTIVES:

The study intends to use demographic and economic data analysis to assess current and future housing needs. It should also provide recommendations for addressing those needs, specifically looking at meeting housing needs at various income levels, land use, and other policy interventions to fill identified gaps, as well as potential fiscal, infrastructure, and other public resource requirements to meet identified needs. The study should incorporate short-term (5-year) and long-term (10-15 year) housing demand forecasts. Growth modeling should consider economic development trends, regional migration patterns, and job growth factors. Consultants must use predictive analytics, GIS mapping, and scenario-based forecasting methodologies to provide actionable insights.

### Scope of Work:

This report will show land use and development trends to build a community profile, identify past change trends, and analyze that data to predict future growth. Consultant Expectations:

- Conduct a kick-off presentation for the elected body, presentations as requested during the engagement, and a final presentation of the draft study.

- Collaborate with staff to understand community issues and context through virtual scoping calls.
- Consultants must conduct at least three (3) community engagement sessions with targeted stakeholders: (1) residents and community groups, (2) major employers, and (3) real estate developers and housing advocates/developers. Additional engagement via surveys or focus groups is encouraged to ensure comprehensive input
- Utilizing available data/information, including the four (4) plans: the Town of Zebulon Vision 2030 Strategic Plan, the Economic Development Strategic Plan, the Comprehensive Land Use Plan, the Comprehensive Transportation Plan, the Parks and Recreation Master Plan, and the Town's Unified Development Ordinance, to ensure continuity in Town plans.
- Create a report with demographic analysis, identify needs and gaps, and make recommendations for land use, housing development, and policy.
- Schedule and facilitate regular update meetings and provide progress reports and other work products at agreed-upon milestones.
- The town's project management oversight will include administering the contract, further defining the scope of services, and supporting the gathering and generating needed data.





## Deliverables:

1

### STUDY:

The study will include:

- Final Study Report (PDF & Editable Format)
- Executive Summary (5-page overview for policymakers)
- GIS Mapping & Data Visualization - Heat maps for housing affordability, zoning recommendations
- Data about citizens to reflect the growing population, including median income, household income, household size, age, race, commuting patterns, etc.
- Future Housing Needs Forecast (5 & 10-year projections)
- Policy & Strategy Recommendations - Including infill housing, zoning incentives, density bonuses, etc.
- Presentation Materials - Slide deck summarizing key findings for elected officials

# Submittal Requirements:



Proposals should demonstrate a high level of experience, enthusiasm, creativity, and expertise in developing unique, place-specific 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 appropriately 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 resumes of key, permanent staff comprising the consultant team. Also, submit the title and length of service in the current position, the role in past projects of a similar nature, and the role/commitment to this project.

3

## **PROPOSED WORK AND TIMELINE:**

- Outline, in sufficient detail, the methods for identifying the housing needs and a proposed outline of the contents of the Housing Study and Demographic Data Analysis.
- The method of stakeholder engagement includes residents, businesses, local government entities, and active nonprofits providing resources for Zebulon's housing needs.



- Proposals should be limited to **20 pages** (excluding resumes & appendices). Firms may include sub-consultants, but must clearly define their roles. While the Town reserves the right to negotiate fees, an estimated budget range of **\$75,000-\$100,000** is anticipated for this project.

Include a detailed phasing timeline with a desired start date of [June 2025](#).

Include a key task list with estimated completion times for each task and a completion date.

#### 4

#### PROJECT EXPERIENCE AND REFERENCES:

Provide brief descriptions of three (3) projects, including housing studies and/or similar topics prepared by or under the direction of your firm. Include in your description the techniques and/or tools utilized in performing. Where applicable, provide examples of municipalities of similar size or conditions following your plan and successfully reaching stated goals. Please also include references for these projects, emphasizing those undertaken within the last five (5) years.



## Evaluation:

1

### PROCESS:

- A Steering Committee comprising town staff, land planning professionals, and other qualified professionals will review the submitted proposals based on the evaluation criteria identified below.
- Each proposal submitted within the deadline will be reviewed to ensure all required materials are submitted according to the guidelines 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 and equitably review and score respondents across all categories.
- Three (3) to five (5) of the high-scoring proposals will be invited to participate in an in-person interview and 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 selections will determine the firm selected.

## 2

## CRITERIA:

- Demonstrated multi-disciplinary experience, qualifications, experience, and professionalism for a 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 preparing housing studies and collecting demographic data.
- Demonstrated capacity and capability of the firm to perform the work within a reasonable timeline, scope, and budget.
- Expertise and knowledge of the Eastern Wake County or regional conditions.
- Level of minority and/or women's participation and leadership in the project team.
- Cost competitiveness of the proposed work; and
- Other issues that may arise during the selection process.

## 3

**QUESTIONS AND SUBMISSION:**

To ensure a consistent response and correct information to all interested parties, potential respondents must submit all questions and requests for clarification in writing to **Shannon Johnson**, [at Sjohnson@townofzebulon.org](mailto:Sjohnson@townofzebulon.org)

All questions must be submitted by **5:00 pm EST on May 9, 2025**, to receive a response before the solicitation closing. An addendum will be posted on the town website showing official responses to all questions submitted. Responses will be provided by **5:00 pm EST on May 16, 2025**. **All proposals must be submitted digitally to [sjohnson@townofzebulon.org](mailto:sjohnson@townofzebulon.org) with the formatted email title Town of Zebulon Housing Study and Demographic Data Analysis RFQ - "Submitting Organization's Name" by **11:59 pm EST on May 27, 2025**, 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. Town of Zebulon staff will review Your Proposal, 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 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 defines 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 for sub-consultants.
- The Town reserves the sole discretion and right to reject any responses received concerning the RFQ and to cancel the RFQ process at any time prior to entering into a formal agreement. The Town reserves the right to request additional information or clarify the information supplied in any response. The Town also reserves the right to waive technicalities and informalities but is under no obligation. 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 the Constitution, case law, or the law of North Carolina. Neither binding contract, the 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.



## 4

## CONTACTS/FURTHER INFORMATION:

- The Town of Zebulon appreciates your interest in providing services for this critical project. For further information or questions regarding the content of this RFQ, please contact Shannon Johnson, [sjohnson@townofzebulon.org](mailto:sjohnson@townofzebulon.org)