



**Chesterfield
Charter Township
Request for
Proposal**

**Planning Consultant
Services Project number
RFP-2018-PZ01**

The Charter Township of Chesterfield, is soliciting qualified vendors to submit a proposal for Planning Consultant Services.

Bid forms and specifications are available at the Township Clerk's Office, 47275 Sugarbush Road, Chesterfield, MI 48047, between the hours of 8:00 a.m. and 4:30 p.m., Monday through Friday. Bid proposals must be submitted in a sealed envelope addressed to Chesterfield Township at the above address and clearly marked "Planning Consultant Services". Bids will be accepted until 10:00 a.m. local time, on January 22, 2019. Bids to be opened immediately following at Chesterfield Township Municipal Offices located at 47275 Sugarbush Road, Chesterfield Township, MI 48047.

Chesterfield Township reserves the right to reject any or all proposals and to waive any irregularities as deemed fit in the best interest of the Township.

Jonathon Palin
Planning and Zoning
Administrator

Chesterfield Township

INSTRUCTIONS TO BIDDERS

In order that all bids may be properly evaluated, it will be necessary that all bidders follow the same procedure in the preparation of their bids. All bids must be made on the Bid Forms attached hereto and received in the office of the Township Clerk by 10:00 a.m. local time, on January 22, 2019. All submissions must also include an electronic copy on a USB thumb drive or other comparable media. Bids to be opened immediately following at Chesterfield Township Municipal Offices located at 47275 Sugarbush Road, Chesterfield Township, MI 48047. All questions must be submitted in writing by January 4, 2018. Questions regarding the content of this proposal should be addressed to Jonathon Palin at jpalin@chesterfieldtwp.org. Questions regarding the submission process or bid opening should be directed to the office of the Township Clerk. All questions will be responded to by January 11, 2018.

It should be addressed to:

Chesterfield Township
Office of the Township Clerk,
47275 Sugarbush Road
Chesterfield, MI 48047
8:00 am -4:30 pm, Monday-Friday

"Planning Consultant Services"

Municipalities are exempt from Michigan State Sales and Federal Excise taxes. Do not include such taxes in the proposal figures. The Township will furnish the successful bidder(s) with tax exemption certificates when requested.

To the fullest extent permitted by law, the successful bidder agrees to defend, pay on behalf of, indemnify, and hold harmless the Township of Chesterfield, its officials, employees and volunteers and others working on behalf of the Township of Chesterfield against any and all claims, demands, suits or loss, including all costs connected therewith, and for any damages which may be asserted, claimed or recovered against or from the Chesterfield Township, its elected and appointed officials, employees, volunteers or others working on behalf of the Township by reason of personal injury, including bodily injury and/or death and/or property damage, including loss of use thereof, which arises out of or is in any way connected or associated with this contract.

All bidders are held to bid prices for ninety (90) days or bid award, whichever comes first, except the successful bidder(s) whose prices shall remain firm for the entire

contract period.

Chesterfield Township reserves the right to reject any or all bids and to waive any irregularities as deemed fit in the best interest of the Township.

**Chesterfield Township
Request for Proposal (RFP)**

**Planning Consultant
Services RFP-2018-PZ01**

1. General Information

The Township of Chesterfield is seeking planning services to assist the Township on an as needed basis, for complete on-call services to aid staff and applicants with regard to Zoning map amendments, Zoning text amendments, Planned Unit Development requests, Land Divisions, Public Street and Utility vacations, Site Plan and Special Land Use approval requests, Landscape Plans, Open space plans, Master Plan amendments, Redevelopment Plans & Proposals and Reuse of Brownfield sites. The successful firm will become an integral team member of all aspects of project review and approval; attend Planning Commission Meetings and Zoning Board of Appeals (if requested) meetings, as well as meet with developers as needed.

2. Scope of Work.

The planning services may include, but not be limited to:

- A. Meet with prospective applicant(s) and/or their consultant team to present Code requirements and discuss initial insights to viability of the proposed project(s). Viability issues will include, but not be limited to, code compliance, site constraints, access, Master Land Use Plan designation, and density.
- B. Review and summarize findings of plans, elevations, and any additional material submitted for technical compliance review. Review and findings shall be based on the Township's current Codes, guidelines, and other standards as they may apply. Response time for preparation and submittal to Building Department of summary reports will vary depending on complexity and degree of change from previous submission.
- C. Conduct field reconnaissance and verification regarding various aspects of site plan approval including, but not limited to, adjacent activities and existing conditions.

- D. Attend Planning Commission meetings twice a month to present summary reports and answer questions regarding various projects and

assignments requested by the Planning & Zoning or Building Department. Attendance when required, at Township Board meeting, and meeting with staff.

- E. Conduct research and analysis on an as needed basis, as requested by the Planning & Zoning or Building Department for various issues including but not limited to planning, and land development standards.
 - F. Assist the Planning & Zoning or Building Department in developing reports and supporting graphics for but not limited to the Planning Commission and Zoning Board of Appeals.
 - G. Assist the Planning & Zoning or Building Department in interpreting and applying the standards contained within the Township's Zoning and Land Regulation Codes, including but not limited to developmental compliance, and architectural guidelines.
 - H. Additional related services as mutually agreed to by the Township and the selected firm.
- B. Project assignments will be on an as-needed basis. Not each project submitted to the Township for review and approval will necessarily require any or all of the professional services of the firm. The Township reserves the right to perform work in-house or to assign specific projects on a separate competitive or negotiated basis to the selected firm or to other firms currently working on existing Township projects.
- C. To assist the firm, the Township will provide the firm copies of all current Codes, maps, aerials, previous meeting minutes and historical codes as available, appropriate and as legally possible, in possession of the Township relevant to the nature of the work assignments.

3. Service Specifications

The following is a general outline of the type of work to be performed by the successful firm. Broadly stated, the Township desires to seek professional planning services to provide the following basic services.

- A. The firm shall perform professional services including basic plan review for various projects submitted to the Township for approval. The basic services require that the proposed projects be evaluated to determine compliance with the minimum (or maximum) land development standards and requirements of the Township's various Codes, Ordinances, Guidelines, and Policies.
- B. Based on past practice as well as the Township's Codes, Ordinances, Guidelines, and Policies it can be concluded that the professional services required include knowledge of county, state, local, and legal requirements.
- C. The professional conducting such review shall prepare a report in a timely manner that identifies those areas or sections of the proposal that meets the Township's criteria and those areas or sections that are deficient. When deficiencies are identified it is the Township's policy that a course of action to correct the deficiency is recommended.
- D. The timely manner for conducting the review and preparing the summary report will be determined with each project and any subsequent submittals for the same project. The allotted review time will be mutually determined by the Township and the firm based on the complexity of the project submitted along with the number of corrections/revisions that were identified on previous submittals.
- E. The firm may also participate with Township staff in preliminary or concept meetings, upon request, to provide advisory information to prospective applicants as to how the various standards may apply to their property.
- F. The firm shall also make their professionals available to answer questions directly from citizens and development approval applicants regarding Code compliance whether by phone, fax, mail, electronic mail, or receipt of plans. These procedures would be considered informal, but are to be made available to assist the applicant in a timely and responsive manner. All formal submittals will still be directed to and through the Township's Planning & Zoning Department.
- G. The Township reserves the right and opportunity to request the firm to provide professional services for other activities that include, but are not

limited to, Code analysis, special studies and representation at regional meetings, if Township personnel are not available.

- H. The firm shall represent that all tasks will be performed in accordance with generally acceptable professional standards and further shall represent that the advice and consultation provided shall be within its authority and capacity to the Township as a professional. The firm will comply with the regulations, laws, ordinances and requirements of all levels of government applicable to any assigned project.

4. Contract Period and Payment Terms

- A. A contractual period will begin following Township Board approval of the recommended firm and will be for duration of three (3) years.
- B. Payment will be remitted following receipt of a monthly invoice that includes detailed project information. Payment within 45 days.

5. Minimum Firm Specifications and Mandatory Requirements

- A. The awarded firm will have a minimum of ten (10) years' experience, providing this type of service, in a municipal environment.
- B. The successful firm shall ensure/understand that they will work closely with Township staff during all phases of the work. The successful firm will be considered a key part of the project team, a strong, positive working relationship must be maintained.
- C. All licenses required for a discipline by the State of Michigan shall be maintained by the firm during the course of the contract.
- D. The firm will provide a single point of contact for the duration of the contract.
- E. The firm will ensure a timely completion of assignments.
- F. The firm will comply with administrative procedures of the Township.
- G. The firm will meet with applicable Township departments to review project concerns and issues to seek a coordinated response to applicants.

6. Proposal Information - Proposals not including all this information may be rejected.

- A. Provide a brief narrative of your company's relative work experience highlighting comparable assignments/projects.
- B. Provide a comprehensive list of all services you provide, specifically addressing your firm's methodology for meeting the requirements of the Scope of Services, Minimum specifications and Mandatory requirements listed in this request.
- C. Provide a complete list of sub-consultant firms utilized by your company with contact information.
- D. Provide completed Vendor Questionnaire (Attachment A).
- E. Provide complete Cost Proposal form (Attachment B).
- F. Provide resumes of those staff that will be assigned to the Township of Chesterfield and indicate which staff member will be the lead contact to the Township.

7. Process for Review of Proposals

To be considered, your company must specialize in this type of service and have proven track record of success. When submitting your proposal one (1) original & two (2) copies of the written and priced response will be provided in one sealed envelope/box. The Supervisor, Qualifying Vendor Committee and Planning & Zoning Administrator and staff will review proposals, check references, and interview companies (as needed). The company's proposal which is viewed in the best interest of the Township will be chosen. All proposals will be hand delivered or mailed to the Township Clerk's Office.

VENDOR QUESTIONNAIRE - ATTACHMENT A

_____the undersigned certified the truth
(Name of Company)

and correctness of all statements and of all answers to questions made hereinafter.

Submitted to: Township of Chesterfield
Address: 47275 Sugarbush, Chesterfield MI. 48047
Project: Planning Consultant Services.

___ Corporation _____ Partnership - - - other
--- Individual - - - - - Joint Venture

Company Principal Office Location _____

Date Statement of Qualifications Submitted _____, 2018

Questions:

1. How many years has your organization been in business as a planning consultant firm?
 How many years has your organization been in business under its present business name?
 Under what other or former names has your organization operated?

2. How many years' experience has your organization had in the municipal planning field?

3. If a corporation, answer the following:
 - Date of incorporation:
 - State of incorporation:
 - President's name:
 - Vice-President's name(s):
 - Secretary's name:
 - Treasurer's name:

4. If an individual or partnership, answer the following:
- Date of organization:
 - Name and address of all partners (State whether general or limited partnership):
5. If other than a corporation or partnership, describe organization and name the principals: _____
- _____
6. List State and categories in which your organization is legally qualified to do business. Indicate registration or license numbers, if applicable. List States in which partnership or trade name is filed. _____
- _____
7. How many clients does your company currently serve with the type of services described?
- _____
- _____
8. Have you ever failed to complete any work awarded to you?
- If so, note when, where and why.
- _____
- _____
9. Within the last five years, has any officer or partner of your organization ever been an officer or partner of another organization when it failed to complete a contract? _____
- a. If so, where and why?
- _____
10. Has any officer or partner of your organization ever failed to complete a contract handled in his name? _____

If yes, state name of individual, name of owner and reason therefore.

11. In what other lines of business are you financially interested?

12. Name of your bank and financial references:

13. How many employees does your company employ?

Full-time employees: _____ Part-time employees: _____

14. How many planners does your company employ?

Total Planners: __ __ _ A.I.C.P Certified: _____

15. List the experience of the key individuals of your organization: NAME, POSITION, YEARS OF EXPERIENCE WITH YOUR COMPANY AND IN WHAT CAPATOWNSHIP.

16. The work, if awarded to you, will have the personal supervision of whom?

17. Is your firm a member of the American Institute of Certified Planners?

Yes ___ No

18. Is your firm a member of the American Planning Association?

Yes____ No__

19. Is your firm a member of the Michigan Association of Planning?

Yes____ No__

20. Is your firm a professional community planner registered with the State of Michigan? Yes____ No____

21. Has there been any complaints filed against your firm with the State of Michigan? Yes____ No____

If so, what was the complaint? _____

22. Has your firm been involved in a lawsuit as a result of the services you provided? If so, can you provide information regarding the case and outcome? _____

23. References

List five (5) municipalities where you have provided planning consultant services for in the last five (5) years.

1) Entity Name: _____ Contact Person: _____

Address: _____ Phone#: _____

Description of Project/Service Provided _____

2) Entity Name: _ _ _ _ _ Contact Person: _____

Address: _____ Phone #: _ _ _ _ _

Description of Project/Service Provided _____

3) Entity Name: _____ Contact Person: _ _ _ _ _

Address: _____ Phone #: - - -

Description of Project/Service Provided _____

4) Entity Name: _____ Contact Person: _____

Address: _____ Phone #: _____

Description of Project/Service Provided _____

5) Entity Name: _____ Contact Person: _____

Address: _____ Phone #: _ _ _ _ _

Description of Project/Service Provided _____

ATTACHMENT B

COST PROPOSAL

- A. **Monthly Retainer:** Rates should include all personnel, travel time and reimbursable expenses. (These rates should be good for the full 3 year contact.)

Per Month Rate: \$ _____

Retainer Services to include:

- (1). Attendance at two regular Planning Commission meeting per month to review current planning issues and for assistance in planning program implementation and coordinate current planning matters with the Township.
- (2). Keep the Township's Zoning Map current.
- (3). All staff meetings, telephone calls, and emails with Township officials regarding any planning matter or ordinance review matters.
- (4). Telephone conference or review with any developer regarding proposed projects in the Township.
- (5). Preparation of public hearing notice, minor ordinance revisions, written interpretations.
- (6). Coordination Township planning activities with other public agencies such as Macomb County, and the State of Michigan.

B. Reviews for items such as site plan, special land use, PUD, rezoning, subdivision/site condominium, etc.

Determined as base cost plus (\$ _____) + \$ _____ / residential unit or \$ _____ / commercial acre.

C. Sign reviews:

\$ _____ / unit.

D. Special Meeting and Project Requests: Handled on an Hourly Rate basis. The Township is requesting hourly rates for personnel, identified by classification. If your firm has additional classifications please submit in the space provided.

Position	Per hour rate
Certified Planner	\$
LEED Certified Planner/LA	\$
Associate Community Planner	\$
Registered Landscape Architect	\$
Drafting	\$
Technical Aides	\$
Administrative Support Staff	\$

E. Proposals: The cost to prepare a proposal for additional work or special projects will be done at no additional cost whether or not the Township enters into a contract with the Planner for the services proposed. The retainer should also include an annual 3-hour training session with instruction by a certified planner for a joint group including the Planning Commission and Zoning Board of Appeals at no additional charge to the Township.