



REQUEST FOR QUALIFICATIONS

Project: Missoula County Zoning Regulations Amendments – Phase 2

Date: August 17, 2018

1. Introduction

[Missoula County Community and Planning Services \(CAPS\) is requesting statements of qualifications from planning consultants to carry out extensive text and graphic amendments to the Missoula County Zoning Regulations.](#) Missoula County has preliminarily budgeted \$150,000 for this project, with an anticipated completion in 2019-2020.

CAPS staff has already begun work on these zoning regulation amendments and seeks professional consultation and drafting services for a new set of zoning regulations, including consideration of form-based codes and SmartCode modules. The consultant will assume the lead role in public outreach, including strategic outreach to frequent users of the code and intergovernmental coordination. Staff will assist in public outreach and may take the lead in taking the proposal through the Planning Board and County Commissioners public hearing process, with an active and supporting role by the consultant.

2. Background

Missoula County, located in western Montana, has a population of 109,299 (as of the 2010 census) with approximately two-thirds residing within the city. In June 2016, Missoula County adopted a new growth policy (comprehensive plan), and zoning is identified within this document as a key mechanism to implement many of the goals of this plan. In addition, the Missoula Area Mapping Project which is currently underway will result in an updated land use map for the Missoula urban area, an area currently zoned under the Missoula County Zoning Regulations.

The Missoula County Zoning Regulations, originally adopted in 1976 and most recently amended in April 2017, govern land use and development outside of the city limits, but they are primarily applied within the Missoula Valley.

Amendments adopted in 2017 (Phase 1) focused on ensuring compliance with state law and county policy and incorporated several major changes, including shifting to “pyramidal” zoning, incorporating condominium/townhomes into some districts, and revising regulations pertaining to accessory structures, home occupations, building height and hillside regulations.

3. Objectives

This project (Phase 2) is aimed at creating zoning regulations that reflect Missoula County’s growth policy. The county is working toward completion of the Missoula Area Mapping Project as a component of the 2016 Missoula County Growth Policy. The revised zoning regulations must necessarily implement elements of the growth policy and mapping project.

A key guiding principle of this project is to enhance the quality of life in Missoula County through the minimal application of effective land use regulation. This means incorporating elements that achieve community goals, such as those outlined in the 2016 Missoula County Growth Policy, such as providing

opportunities for a wide range of housing choices, increasing economic opportunity, promoting sustainability and quality design, reducing risk of development in hazardous areas, protecting natural resources and environmental functions, while removing unnecessary barriers to quality development. Our primary focus is on using site design standards to mitigate impacts of certain land uses and encourage stability of existing neighborhoods while allowing for flexibility and change over time.

It will be important to produce zoning regulations that are internally consistent, easily read and understood, and easy to update since CAPS staff plans for ongoing regular maintenance of these regulations. Another important factor influencing the direction of the Phase 2 County Zoning Amendments is to improve compatibility with the City of Missoula Zoning Regulations (Title 20).

4. Scope of Work

Missoula County Community and Planning Services is requesting statements of qualifications to identify a consulting firm to help lead the community in the preparation and adoption of an update to the County Zoning Regulations. The project scope includes a review of the existing County Zoning Regulations and the concepts generated by staff to date for this project. The result is intended to be a significant revision, if not a complete rewrite of the existing regulations to achieve community goals and address needed updates to the current code. We expect this project to involve significant interaction with CAPS and other county staff. The final Scope of Work will be developed with the selected consultant in conjunction with county staff. The consultant is expected to provide interpretation and identification of deliverables or milestones it believes are integral to the project in the statement of qualifications. However, Scope of Work elements are expected to include the following, at a minimum:

- Conduct a current code audit using applicable plans and policies to inform the content of updates and amendments.
- Based on the code audit, work with county staff to prioritize draft revisions in the following major focus areas:
 - Building and site design standards (especially for commercial and multi-dwelling and condominium and townhouse developments (C-TED as found in Section 3.06 O. of the County Zoning Regulations)
 - Use and building standards (for such uses as accessory dwelling units, enterprise commercial, mobile home parks/tiny homes, RV parks, tourist homes, etc.)
 - Parking and landscaping (including fences)
 - Signs
 - Special Zoning Districts – regulations to allow for creation of unique, stand-alone special zoning districts as zoning implementation to match the “Community Center” designation anticipated in Missoula Area Mapping Project (MAMP)
 - District standards, “Use Group” standards, development options (examples include evaluating height allowances in commercial districts, minimum lot size in residential, etc.)
 - Riparian habitat and resource protection
 - Hillside/ridgeline standards
 - Agricultural land preservation/cluster development standards
 - Miscellaneous administrative sections pertaining to definitions, measurements, nonconformities, violations, penalties, and enforcement
- Based on policy review, code audit and recommended code revisions, in collaboration with staff, prepare draft sections of the zoning code, including graphics, for review by county staff and then the public.

- Update elected officials in collaboration with county staff as needed.
- Lead a strategic public outreach process, with assistance from staff, designed to collect input and inform community stakeholders and the general public on the code updates, as well as conduct meetings and web/social media interaction.
- Prepare revised zoning code drafts and actively support CAPS staff in presenting to the Missoula Consolidated Planning Board and the Missoula Board of County Commissioners for review and adoption.
- Provide project management reports to CAPS staff at major project milestones and detailed invoices at pre-determined regular intervals.
- Provide final review and coordination with CAPS staff to complete adoption process.

5. Consultant Role

At a minimum, CAPS staff envisions that the selected consultant will have the following responsibilities (with assistance from CAPS staff):

- A. Overall management of the County Zoning Regulations Amendment process.
- B. Lead public participation for the project; actively support staff in public hearing process.
- C. Analysis and incorporation of existing conditions, documents, the growth policy and Missoula Area Mapping Project, related plans, policies, and any other concepts that should be part of the proposal (*e.g.* SmartCode provisions, form-based code elements).
- D. Advise on sections prepared by staff to date that are intended as a starting point for the Phase 2 amendments.
- E. Draft preliminary and final documents, including text, graphics, tables, charts, and links.
- F. Periodic communication with the Planning Board and County Commissioners regarding proposed amendments to the Missoula County Zoning Regulations.

6. Deliverables

The consultant shall provide a digital copy of the final County Zoning Regulations in Microsoft Word and Adobe PDF format to CAPS upon adoption. All data and information collected through the process shall be provided in digital copies. All relevant maps shall be provided in GIS format, including associated data. All graphics shall be provided in digital format.

7. Consultant Selection Process

Missoula County will review statements of qualifications and may invite the consultants that the County determines to be the most qualified candidates to participate in interviews with a selection team. The team may interview finalists in person or by phone; however, the team may determine that interviews are not necessary.

The following criteria will be considered in the review and selection of a consultant:

- Responsiveness, completeness, and quality of submittal
- Project approach
- Relevant experience, team leadership, team capabilities, and success on previous similar projects, including bringing projects in on time and on budget
- Demonstrated understanding of the project goals and objectives, Missoula County land use issues, and the role of public involvement
- Experience in implementing a growth policy (comprehensive plan/master plan) related to land use, transportation, affordable housing, economic development, sustainability, hazard mitigation and resource protection
- Experience in preparation of code audits and zoning regulations and demonstrated skill and proficiency in form-based code preparation or other graphically-oriented land use regulations
- Experience in successful public participation, outreach, and consensus building

- Qualifications, experience and skills of consultant team members.
- References and supporting information

Missoula County reserves the right to conduct interviews with all or some of the responding consultants at any point during the evaluation process. The County also reserves the right to make such additional investigation as it deems necessary to establish the competence and financial stability of any respondent. The County reserves the right to reject any and all submissions. Individuals and firms that regularly submit development proposals to the Board of County Commissioners may have a conflict of interest, which will factor into the selection process.

Missoula County will negotiate a professional services contract, including a detailed scope of work, budget, and schedule, with the firm that the County determines to be the most qualified. As such, the County will negotiate with the selected consultant throughout the procurement to get the best price and business terms. In the event that a contract cannot be negotiated, Missoula County may terminate negotiations and negotiate a contract with the firm whose submission and cost are determined to be the next most qualified, based on the selection criteria. The firm selected will need to demonstrate that it is registered and in good standing with the Montana Secretary of State.

Anticipated Timeline for Acquisition of Planning Consultant Services

Submission deadline	September 14, 2018 (5:00 p.m., MDT)
Interviews	October 1-5, 2018
Selection of most qualified applicant	October 15, 2018
Finalize contract negotiations	November 16, 2018
Contract in place	December 3, 2018

8. Submittal Requirements

Statements of qualifications shall be submitted to Community and Planning Services, as noted below, and shall include seven (7) hard copies and an electronic copy (pdf). Examples of past work must be submitted electronically; hard copies will not be accepted. Proposals should be limited to thirty (30) pages, not including personnel profiles, resumes, or examples of previous work, and must include the following:

- A. Cover letter
- B. Resumes and personnel profiles, containing qualifications of firm/project team and services provided
- C. Statement of project understanding
- D. Proposed project scope of work and implementation plan
- E. Statement on approach and experience with effective public participation on similar projects
- F. Timeline
- G. Organization, staffing plan, and approximated distribution of work hours for this project
- H. References for three similar projects completed during the past five years or five similar projects completed during the past ten years
- I. Examples of previous work including one zoning audit and two zoning codes, preferably including examples of land use regulations graphics and form-based code
- J. Detailed itemized fee proposal including a complete list of costs per task, expected reimbursable expenses and a total fee for the proposal

The successful consultant or firm will be expected to execute a Professional Services Agreement with the county and provide evidence of required insurance as outlined below.

The successful consultant or firm will be required to maintain general liability insurance in the amount of one million dollars (\$1,000,000.00) per occurrence and two million dollars (\$2,000,000.00) in the aggregate. The successful consultant or firm will be required to name Missoula County as an additional

insured on a primary and non-contributory basis on the general liability insurance policy. Contractor will be required to maintain professional liability insurance.

The successful consultant or firm will be required to maintain automobile insurance with combined single limits for bodily injury, personal injury, and property damage of five hundred thousand dollars (\$500,000.00) per occurrence and one million dollars (\$1,000,000.00) in the aggregate per year to cover such claims as may be caused by any act, omission, or negligence of the successful consultant or firm. The successful consultant or firm will be required to provide workers' compensation insurance for its employees or provide proof of exemption from Montana statutory requirements for workers' compensation insurance. The successful consultant or firm will be required to furnish proof of required insurance prior to commencing work.

9. Submission Information and Deadline

The deadline for submission is 5:00 p.m., Mountain Daylight Time, September 14, 2018. Submissions must be received electronically or post-marked before 5:00 p.m., September 14, 2018. Faxed submittals and late submittals will NOT be accepted. Information provided in response to this request will be held in confidence and will not be revealed or discussed with competitors prior to award of contract; however, responses to this solicitation become part of the public record after award of contract, except for materials constitutionally protected from disclosure.

Submissions may be withdrawn at any time; however, no submission may be modified after the due date and time, unless and until the award of the contract is delayed for a period exceeding ninety days. The proposer must honor their quote for a period of ninety (90) days after the due date.

The firm/team selected understands that the County reserves the right to provide its opinion publicly and privately regarding the consultant's performance.

10. Contact Information

Mailing address

Missoula County Community and Planning Services
200 W. Broadway
Missoula, MT 59802

Address for delivery by FedEx or UPS

323 W. Alder St.
Missoula, MT 59802

caps@missoulacounty.us

(406) 258-4657

Direct questions to:

Jennie Dixon

jdixon@missoulacounty.us

(406) 258-4946

11. Disclaimer

This request does not form or constitute a commitment of contractual document of any kind. Missoula County shall not be liable for any loss, expense, damage or claim arising out of the advice given or not given or statements made or omitted in connection with this request. The County also will not be responsible for any expenses which may be incurred in the preparation of this request. Modifications, additions or changes to the terms and conditions of this request for qualifications may be cause for rejection of the proposal.

12. Attachments

1. [2016 Missoula County Growth Policy](#)
2. [Missoula Area Mapping Project website](#)
3. [Missoula County Zoning Regulations \(April 27, 2017\)](#)
4. [City of Missoula Zoning Regulations \(Title 20\)](#)
5. [Community and Planning Services website](#)
6. [Preliminary ideas and staff concepts for Phase 2 County Zoning Amendments](#)