



Request for Proposal (RFP)# 24-04

for

**Comprehensive Plan Development**

Issue Date: August 25, 2023

Proposal Due Date and Hour: October 3, 2023 3:00 p.m.

Last Day for written questions: September 15, 2023

Montgomery County Purchasing Department  
755 Roanoke Street, Suite 2C  
Christiansburg, VA 24073-3179

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**Comprehensive Plan Development**

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**COUNTY OF MONTGOMERY, VIRGINIA**  
**RFP # 24-04**

**ISSUE DATE: AUGUST 25, 2023**

Comprehensive Plan DEVELOPMENT

(TO BE COMPLETED AND RETURNED)

**GENERAL INFORMATION FORM**

**QUESTIONS:** All inquiries for information regarding this solicitation should be directed to: Jeff Groseclose, CPPB, VCO, VCA, Procurement Manager, Phone: (540) 382-5784; faxed to (540) 382-5783, or e-mail: [mcpurchasing@montgomerycountyva.gov](mailto:mcpurchasing@montgomerycountyva.gov).

**DUE DATE:** Sealed Proposals will be received until **October 3, 2023** up to and including **3:00PM**. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

**ADDRESS:** Proposals should be mailed or hand delivered to: **Montgomery County Purchasing Department, 755 Roanoke Street, Suite 2C, Christiansburg, Virginia 24073-3179**. Reference the Due Date and Hour, and RFP number in the lower left corner of the return envelope or package.

**COMPANY INFORMATION/SIGNATURE:** In compliance with this Request for Proposal and to all conditions imposed herein and hereby incorporated by reference, the undersigned offers and agrees to furnish the services and goods in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Full Legal Name (print)		Federal Taxpayer Number (ID#)	Contractor's Registration N/A
Business Name / DBA Name / TA Name and Address		Payment Address	Purchase Order Address
Contact Name/Title		Signature (ink)	Date
Telephone Number	Fax Number	Toll Free Number	E-mail Address

**COUNTY OF MONTGOMERY**  
**RFP# 24-04**  
Comprehensive Plan Development

**I PURPOSE:** The intent and purpose of this Request for Proposal (RFP) is to establish a contract through competitive negotiation for consulting services to assist with a substantive comprehensive plan to guide growth and development over the next 20 years for the County of Montgomery County, Virginia herein after referred to as “County.”

**II BACKGROUND:**

**A. General Background**

Montgomery County is located in the southwestern part of Virginia in the region known as the New River Valley. This region takes its name from the New River, the nation's oldest and the world's second oldest river, and includes the counties of Floyd, Giles, Montgomery, Pulaski, and the City of Radford. The County has a land area of 393 square miles and lies in the broad picturesque area between the Appalachian Plateau and the Blue Ridge Mountains. Topography varies from gently rolling to steep mountainous terrain, with elevations varying from 1,300 to 3,700 feet above sea level. The majority of the County is at an elevation of 2,000 feet.

Today the Towns of Blacksburg and Christiansburg, the County seat, are the population centers of the County and are located approximately 35 miles southwest of the City of Roanoke. Blacksburg is home to Virginia Polytechnic Institute and State University (Virginia Tech). Founded in 1872 as a land-grant college, Virginia Tech is the largest public university in Virginia and one of the country's leading research institutions. The Weldon Cooper Center estimates the population of Montgomery County at 102,061 (as of July 1, 2022). This includes two incorporated towns, Blacksburg and Christiansburg, with a combined population of approximately 67,365.

The County is governed by an elected seven-member Board of Supervisors who appoints a County Administrator.

**B. Specific Background**

Since the current Comprehensive Plan was initially adopted in 2004, Montgomery County has experienced substantial growth. This has not been limited to population. The County has seen expanded forms of renewable resources, increased agritourism endeavors, utility/infrastructure enhancements/upgrades, and expanded public safety needs. These issues and more need to be reflected and addressed in an updated plan.

County staff has worked on a number of initiatives related to long-range planning within the County in the past several years. These efforts include the development of a County-wide Transportation Plan, village area planning efforts, and participation in a region-wide housing study. These documents should be integrated into the final comprehensive plan document.

### **III STATEMENT OF NEED:**

The County needs the services of a Consultant that can provide knowledge and experience in rural county-level strategic planning, land use planning, engaging the public and stakeholders in plan development, and the ability to translate identified vision and goals into implementable strategies. Significant consideration will need to be given to development specific growth management strategies to protect the rural character of the County while supporting the increased growth to addressing housing and economic development needs. The County currently has six (6) identified village areas and two (2) additional UDA's located within the unincorporated area.

#### **A. CONTRACTOR REQUIREMENTS:**

1. Development of the "Montgomery Matters" Comprehensive Plan including individual village plans for the identified villages.
2. Hosting of a project website that can be transferred to Montgomery County upon completion. The website should look as though it is an extension of the County with all branding, color schemes, logos, etc.
3. A comprehensive public engagement plan for the "Montgomery Matters" Comprehensive Plan and Village Plan updates that is prepared with input from Montgomery County staff.
4. Attendance in person or via Zoom at routine meetings with stakeholders, County Staff, public, etc. during plan development. Presentation at a joint work session with the Board of Supervisors and Planning Commission to discuss the draft plan once completed.
5. Digital copies of any presentation materials used in public meetings/workshops.
6. Summary reports of each public input session as well as other preliminary reports and project updates prepared at designated milestones. Those milestones will be predetermined with Montgomery County staff.
7. Draft "Montgomery Matters" Comprehensive Plan shall include a digital copy in an editable file format agreed upon by both parties; and one (1) digital copy in PDF format.
8. Final "Montgomery Matters" Comprehensive Plan, including a handbook/summary chapter, shall include a digital copy with print ready graphics in an editable file format agreed upon by both parties; and one (1) digital copy in PDF format. Ten (10) bound hard copies shall also be provided.
9. Digital copies of all working and/or resource materials (surveys, meeting notes, reports, summaries, etc.) specific to Montgomery County.

#### **B. COUNTY REQUIREMENTS:** The County will provide with the following:

1. Planning staff will be available at all meetings.
2. Access to GIS data.
3. Images to be used throughout the document including all County branding (logos, color scheme, etc.).
4. Legal notices/advertisements, public announcements, press releases, social media promotion, etc.
5. Review of all documents/materials in coordination with the Planning Commission and/or it's subcommittee.
6. Coordination of meeting space(s).

**C. OFFEROR’S QUALIFICATIONS:** The Offeror shall provide the information that evidences their ability to develop a Comprehensive Plan document that addresses all required elements of §15.2-2223 of the Code of Virginia prepared in a manner that includes strong mapping and graphics formatting, a user-friendly narrative, and implementation strategies/solutions. The offeror shall also demonstrate their ability to provide innovative, effective public engagement strategies/opportunities.

**D. EXCEPTIONS:** Any and all deviations from, or exceptions to, the Statement of Need and other requirements contained herein must be listed and prominently laid out in proposal materials, and should be clearly stated by the offeror in a separate section titled “Exceptions”.

**IV. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:**

**A. GENERAL REQUIREMENTS:**

1. RFP Response: In order to be considered for selection, Offerors must submit a complete response to this RFP to include:

- a. **One (1) original and four (4) paper copies of the entire proposal INCLUSIVE OF ALL ATTACHMENTS.** Any proprietary information should be clearly marked.
- b. **One (1) electronic copy** in WORD format or searchable PDF (USB/Flash Drive) of the entire proposal as one document, **INCLUSIVE OF ALL ATTACHMENTS** mailed along with the hard copy above. Any proprietary information should be clearly marked.
- c. Should the proposal contain **proprietary information**, provide **one (1) redacted** electronic copy in WORD format or searchable PDF (USB/Flash Drive) of the entire document **INCLUSIVE OF ALL ATTACHMENTS. All identified proprietary information should be blacked out.** This USB/Flash Drive should be marked **“Redacted Copy”**.
- d. Response shall be submitted to:

Jeff Groseclose, CPPB, Procurement Manager  
Montgomery County Purchasing Department  
755 Roanoke Street, Suite 2C  
Christiansburg, VA 24073

Identify on outside of envelope: **Sealed RFP # 24-04**

RFP Due date and hour: **October 3, 2023, 3:00 P.M.**

The Offeror shall make no other distribution of the proposal.

2. Proposal Preparations:

- a. Proposal shall be signed by an authorized representative of the Offeror. All information requested should be submitted. The Procurement Manger will review all proposals to ensure required information is included. Failure to submit all information requested may result in a request to submit the missing information. Proposals which are substantially incomplete or lack key information may be rejected as incomplete. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
- b. Proposals will be reviewed and evaluated by a Committee as designated by the County.
- c. Proposal should be prepared simply and economically, providing a straight forward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
- d. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub-letter, and repeat the text of the requirements as it appears in the RFP. If a response covers more than one page. the proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
- e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
- f. Ownership of all data, materials and documentation originated and prepared for the County pursuant to the RFP shall belong exclusively to the County and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protections of Section 2.2-4342D of the Code of Virginia, in writing, either before or at the time the data or other materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection of the proposal.

**B. SPECIFIC REQUIREMENTS:** Proposals should be as thorough and as detailed as possible so that the County may properly evaluate your capabilities to provide the required services. Offerors

are required to submit the following information/items as a complete proposal:

1. The return of the RFP general information form and addenda, if any, signed and completed as required.
2. Please provide three (3) recent references, similar to Montgomery County, for whom you have provided the type of services described herein. Include the date(s) services were furnished, the client name, address and the name and phone number of the individual Montgomery County has your permission to contact.
3. Project Understanding: The proposal demonstrates that the consultants understand the needs and priorities of the County
4. Approach and Methodology: The proposal demonstrates that the consultant team has a well-developed understanding to satisfy all items in the Statement of Need.
5. Experience and Qualifications: The members of the contract team and any subcontractors possess the necessary skills and experience to successfully develop a Comprehensive Plan document that addresses all required elements of §15.2-2223 of the Code of Virginia.
6. Reasonable details of cost estimates broken out by project task and deliverables.
7. Offeror may submit other information believed pertinent for consideration.

**V. EVALUATION AND AWARD OF CONTRACT:**

**A. Award of Contract:** Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for proposal. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, Montgomery County shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract tot that offeror. Montgomery County may cancel the Request for Proposal or reject proposals at any time prior to an award, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous. (Section 2.2-4359D, Code of Virginia.) Should Montgomery County determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms, and conditions of the solicitation and the contractor's proposal as negotiated. See Attachment B for sample contract form.



**B. Evaluation Criteria:** Proposals shall be evaluated by the County using the following criteria:

<u>EVALUATION CRITERIA</u>	<u>WEIGHT</u>
1. Qualifications and Experience	25
2. Method and plan for providing services	25
3. Cost of Goods/Services	25
4. Prior Project Examples	15
5. References	10

**VI OPTIONAL PRE-PROPOSAL CONFERENCE:** A pre-proposal conference will be held at **3:00 pm on Day, September 13, 2023** at 755 Roanoke Street, Christiansburg, VA 24073 in **Multipurpose Room #2**. The purpose of this conference is to allow potential Offerors an opportunity to present questions and obtain clarification relative to any facet of this solicitation. Potential offerors may also attend by teleconference.

Email [mcpurchasing@montgomerycountyva.gov](mailto:mcpurchasing@montgomerycountyva.gov) no later than 5:00 pm on September 12, 2023 to pre-register for the conference and to receive instructions for attending in person or by teleconference. If you do not pre-register by this deadline, there is no guarantee you will receive instructions prior to the meeting to attend via teleconference.

While attendance at this conference will not be a prerequisite to submitting a proposal, offerors who intend to submit a proposal are encouraged to attend. Bring/have a copy of this solicitation with you during the conference. Any changes resulting from this conference will be issued in a written addendum to this solicitation.

Potential offerors are encouraged to submit written questions before the conference so questions may be addressed during the meeting. Written questions must be submitted by email to Jeff Groseclose at [mcpurchasing@montgomerycountyva.gov](mailto:mcpurchasing@montgomerycountyva.gov) no later than close of business on September 15, 2023.

**VII RESERVATION OF RIGHTS:** Montgomery County reserves the right to award in part or in whole, to one or more vendors, or to reject any or all proposals, whichever is deemed to be in its best interest.

**VIII CONTRACT ADMINISTRATION:** Brea Hopkins, Director of Planning & GIS Services, or their designee, shall be identified as the Contract Administrator and shall use all powers under the contract to enforce its faithful performance. The Contract Administrator, or their designee, shall determine the amount, quantity, acceptability, fitness of all aspects of the services and shall decide all other questions in connection with the services. The Contract Administrator, or their designee, shall not have the authority to

approve changes in the services which alter the concept or which call for an extension of time for this contract. Any modifications made must be authorized by the Montgomery County Purchasing Department through a written amendment to the contract.

**IX**     **CONTRACT PERIOD:** The initial term of this contract is for one (1) year or as negotiated. There will be an option for four (4) one-year renewals or as negotiated.

## ATTACHMENT A TERMS AND CONDITIONS

### GENERAL TERMS AND CONDITIONS

[https://montgomerycountyva.gov/docs/default-source/purchasing-solicitations/rfp\\_terms\\_and\\_conditions.pdf?sfvrsn=ecfd231d\\_2](https://montgomerycountyva.gov/docs/default-source/purchasing-solicitations/rfp_terms_and_conditions.pdf?sfvrsn=ecfd231d_2)

### SPECIAL TERMS AND CONDITIONS

1. **ADDITIONAL GOODS AND SERVICES:** The County may acquire other goods and services that the supplier provides than those specifically solicited. The County reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services as negotiated under the same terms and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products components, accessories, subsystems, or related services that are newly introduced during the term of the contract. Such additional goods and services will be provided to the County at favored nations pricing. The exact pricing of these goods and services will be negotiated and determined at the time of procurement.
2. **AUDIT:** The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. Montgomery County, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
3. **AUTHORIZED USERS:** Additional State agencies, institutions and/or other public bodies may be added or deleted to receive the goods or services resulting from this solicitation. Montgomery County Purchasing Department shall be notified by the contractor or the specific agency intending to use the contract to determine if a written modification to the contract is necessary. Such modifications, when/if required, shall name the specific agency added or deleted and the effective date.
4. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that Montgomery County shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
5. **CANCELLATION OF CONTRACT:** Montgomery County reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
4. **INDEPENDENT CONTRACTOR:** The contractor shall not be an employee of Montgomery County, but shall be an independent contractor. Nothing in this agreement shall be construed as authority for the contractor to make commitments which shall bind Montgomery County, or to otherwise act on behalf of Montgomery County, except as Montgomery County may expressly authorize in writing.
5. **INSURANCE:**

By signing and submitting a proposal under this solicitation, the Offeror certifies that if awarded the contract, it will have the following insurance coverages at the time the work commences. Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

During the period of the contract, Montgomery County reserves the right to require the Contractor to furnish certificates of insurance for the coverage required.

INSURANCE COVERAGES AND LIMITS REQUIRED:

  - A. Worker's Compensation - Statutory requirements and benefits.
  - B. Employers Liability - \$100,000.00
  - C. General Liability - \$500,000.00 combined single limit. Montgomery County and the Commonwealth of Virginia shall be named as an additional insured with respect to goods/services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.
  - D. Automobile Liability - \$500,000.00

The contractor agrees to be responsible for, indemnify, defend and hold harmless Montgomery County, its officers, agents and employees from the payment of all sums of money by reason of any claim against them arising out of any and all occurrences resulting in bodily or mental injury or property damage that may happen to occur in connection with and during the performance of the contract, including but not limited to claims under the Worker's Compensation Act. The contractor agrees that it will, at all times, after the completion of the work, be responsible for, indemnify, defend and hold harmless Montgomery County, its officers, agents and employees from all liabilities resulting from bodily or mental injury or property damage directly or indirectly arising out of the performance or nonperformance of the contract.
6. **MINORITY BUSINESS, WOMEN-OWNED BUSINESSES SUBCONTRACTING AND REPORTING:** Where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such business to minority and/or women-owned businesses. Names of firms may be available from the buyer and/or from the Division of Purchases and Supply. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office the following information: name of firm, phone number, total dollar amount subcontracted and type of product/service provided.
7. **PROPOSAL ACCEPTANCE PERIOD:** Any proposal received in response to this solicitation shall be valid for (90) days. At the end of the (90) days the proposal may be withdrawn at the written request of the Offeror. If the proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is cancelled.

## ATTACHMENT B

**COUNTY OF MONTGOMERY  
STANDARD CONTRACT**

**Contract Number:**

This contract entered into this \_\_\_ day of, 202\_\_, by \_\_\_\_\_ hereinafter called the “Contractor” and the County of Montgomery, called the “County”.

**WITNESSETH** that the Contractor and the County, in consideration of mutual covenants, promises and agreements herein contained, agree as follows:

**SCOPE OF SERVICES:** The Contractor shall provide the services to the County as set forth in the Contract Documents.

**CONTRACT PERIOD:** The initial contract period is \_\_\_\_\_ through \_\_\_\_\_.

**COMPENSATION AND METHOD OF PAYMENT:** Payment to the County shall be made in accordance with the Contract Documents.

**CONTRACT DOCUMENTS:** The Contract Documents shall consist of signed Contract, the statement of need, general terms and conditions, special terms and conditions, specifications, and other data contained in this Request For Proposal Number, dated \_\_\_\_\_, together with all written modifications thereof, the proposal submitted by the Contractor dated \_\_\_\_\_ and the Contractor’s letter dated \_\_\_\_\_, all of which contract documents are incorporated herein.

In **WITNESS WHEREOF**, the parties have caused this Contract to be duly executed intending to be bound thereby.

**CONTRACTOR:**

**COUNTY OF MONTGOMERY:**

By: \_\_\_\_\_ By: \_\_\_\_\_

Title: \_\_\_\_\_ Title: \_\_\_\_\_