



# REQUEST FOR PROPOSALS (RFP)

## CONSULTANT SERVICES GENERAL PLAN UPDATE

<b>Solicitation No.:</b>	<b>RFP-2022-02</b>
<b>Published Date:</b>	<b>August 3, 2022</b>
<b>Project:</b>	<b>Carefree General Plan 2040 Update</b>
<b>Pre-Proposal Conference:</b>	<b>August 10, 2022 at 10:00 a.m. (Arizona Time) Town Council Chambers – 33 Easy Street</b>
<b>Questions Deadline:</b>	<b>August 12, 2022 at 10:00 a.m. (Arizona Time)</b>
<b>Responses to Questions (Town):</b>	<b>August 19, 2022 at 4:30 p.m. (Arizona Time)</b>
<b>Solicitation Due Date:</b>	<b>August 29, 2022 at 2:00 p.m. (Arizona Time)</b>
<b>Submittal Location: (cannot be used for Postal Service mailing)</b>	<b>Carefree Town Hall 8 Sundial Circle Carefree, AZ 85377</b>

All submittals must be received by the Town of Carefree at the Carefree Town Hall, by the date and time stated above. Late submittals will not be considered. Submittals received by the correct date and time shall be opened and receipt documented. Offerors are advised to carefully read the entire solicitation package. Submittals that do not comply with all of the instructions may be disqualified.



PO BOX 740  
CAREFREE, ARIZONA 85377

# REQUEST FOR PROPOSALS

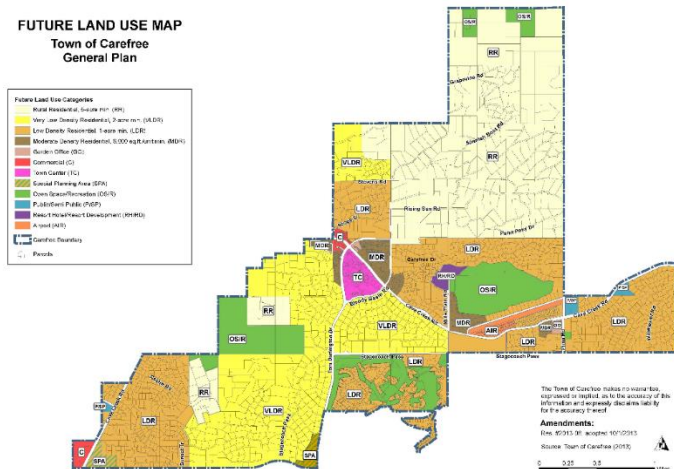
## GENERAL PLAN UPDATE SERVICES

### PURPOSE OF SOLICITATION

The Town of Carefree (the “Town”) is seeking proposals from qualified offerors to prepare a comprehensive update to the Town’s General Plan for approval by the Town Council and ratification by the Carefree voters in 2024. This will be the Town’s second General Plan to be ratified by the residents.

The updated General Plan will have a fresh new look that is Web friendly, graphically pleasing and is easily understood, while still meeting all of the statutory requirements. Certain goals and objectives may require a rewrite, while others may be mostly pertinent as currently written yet allow for current data to confirm they are still relevant. The successful consultant will provide thorough, thoughtful, innovative and professional services in the form of research, compilation of data, public outreach strategies, analysis, and preparation of draft and final documents under the direction of the Town’s Planning Director. A description of the consultant’s required professional services for the project are detailed in the *Scope of Work* below. The existing General Plan is available for review online at: <https://carefree.org/DocumentCenter/View/53/Carefree-General-Plan-2030-PDF?bidId=>

Also, the successful consultant will be responsible for creating a process that is thorough and transparent with a variety of methods and opportunities for public input. The project is anticipated to take more than a year to complete. The Town requires that the project schedule be programmed with appropriate public hearings and materials to be on the November 2024 ballot. The Town intends to award a single contract and will consider qualified multi-disciplinary teams of primary and sub-consultants.





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## SCOPE OF WORK

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The main objective by the Town of Carefree is to create *General Plan 2040* by updating the Town's existing General Plan through a process that complies with Arizona Revised Statutes, Town codes, and meets the robust level of engagement Town residents expect for a long-range planning process. The overall timeframe for the General Plan update process from hiring of the consultant to ratification is October 2022 to November 2024. The consultant should anticipate active engagement by the Town Council, Planning Commission, and Town residents that requires quick responses, detailed explanations by experts on that topic, and planning on unexpected meetings to accommodate focused discussions that may arise during the process. As such, the proposed scope of work from the consultant shall take this into consideration.

The end deliverable will be an updated General Plan the Town can rely on for the next ten years. However, the expectation is that the new General Plan will be as succinct as possible and not result in a major shift of the Town's vision and values. The modified Plan will likely retain many of the same or similar components that promote the Town's vision and values and will refine aspects in the current General Plan that have been met or no longer align with the Town's vision and values. These vision and values include enhancing the premier, low density, residential character of the Town; preserving the sense of privacy, quiet, dark skies, open spaces, and natural environment that residents enjoy; and limits commercial development to best harmonize with the Town's vision and values in a way that respects the quality of life of Town residents while still affording the ability of the Town's undeveloped non-residential properties to evolve and change.

The Town's limited staff requires the need to seek consultant services to update its General Plan. The consultant's proposal shall seek to keep overall costs low by identifying opportunities for cost-saving measures. Said proposal shall incorporate the following items in the phases outlined in this request but does not necessarily need to be exactly as described. The Town encourages the consultant to bring forward approaches, tasks, and other public engagement methods its finds will work for current demographics within the Town of Carefree. The proposal shall highlight projects and consultant member experience in working in a community similar to Carefree.

The selected consultant will lead the planning process and develop project deliverables with oversight from the Planning Director. All work shall be completed in accordance with applicable State Statutes and Town standards within the agreed upon timeline. The intent of the Scope of Work is to serve as a framework which consultants can use to develop a more detailed scope of services based on their professional expertise and knowledge. The final scope of services will be developed in collaboration with the selected firm and Town staff prior to contract approval by the Town Council.



**SECTION 1.1: GENERAL PROJECT OBJECTIVES**

- ❖ **PHASE 1: PROJECT START-UP** *(estimated this Project Start-Up phase would start in October of 2022).*

**The Consultant Shall:**

1. Conduct preliminary administrative tasks including, but not limited to:
  - a. Review the current General Plan and other background materials such as the Town’s history, demographic and Census data, other Town plans such as the Village Center Master Plan, and other relevant information;
  - b. Meet with Town staff, appointed officials, and elected officials to discuss issues such as the project goals, opportunities, information needs, roles and responsibilities, expectations, and logistical issues;
  - c. Gather base GIS data, maps, and other technical information needed from staff; and
  - d. Review adjacent agencies, regional, and other General Plans or plans that may impact the Town of Carefree, in particular the City of Scottsdale, Town of Cave Creek, and Maricopa County, with a deliverable that summarizes the key components of this research and how these key components may impact the Town.
2. Prepare a Public Participation Plan that meets or exceeds Arizona Revised Statutes and the Citizen Participation Ordinance. The goals of the Public Participation Plan are to:
  - a. Create awareness and understanding of the General Plan;
  - b. Seek to receive input from a broad, cross-section of the community;
  - c. Understand residents’ attitudes and opinions regarding the direction of the Town’s growth and development, key issues facing the Town, and their views regarding the Town’s future;
  - d. Affirm community vision and values;
  - e. Identify common ground on issues where there is a diversity of perspectives;
  - f. Promote intergovernmental and interagency cooperation and collaboration;
  - g. Include follow-up meetings with stakeholders to report on project progress and findings and solicit feedback on findings and recommendations; and
  - h. Use approaches that recognize that the General Plan Update vision and many components will likely be similar to or more of an updating of the existing General Plan.The Public Participation Plan should include various ways to encourage resident involvement and broad-based participation, including but not limited to a community-wide survey and neighborhood meetings. The consultant proposal should identify how best to accomplish this participation as well as a timeline for creation and adoption of the Public Participation Plan.
3. Attend and assist Town staff during the Town Council approval of the Public Participation Plan. Approval of the Public Participation Plan will require at least one study session meeting and an action meeting by the Town Council. Approval of the Public Participation Plan shall include an explanation of the scope of work to be performed, explanation of stakeholder level of involvement, and an overview of the project schedule.
4. Conduct a kick-off meeting with the Town Council and others who will be responsible for



regularly reviewing the progress of the project and providing input to the consultant and staff in a public setting.

5. Research, collect, and synthesize the necessary background data for the General Plan that will culminate into an existing data background report or appendix. This would include, and may not be limited to, the historical context for the Town of Carefree, annexation data, existing land use data by zoning district, undeveloped land, water service improvements, and other related information. Town staff will provide the consultant with any available data.

❖ **PHASE 2: VISIONING AND GATHERING INPUT**

**The Consultant Shall:**

1. Prepare and edit (with Town Staff review) an informational brochure of *Frequently Asked Questions* (FAQs) about the General Plan Update to be placed on the Town's website and available for distribution at General Plan public meetings.
2. Prepare a community-wide survey to be distributed in a manner or in combination with public outreach approaches that will have the greatest respondent outcome.
3. Develop drafts and prepare an updated/revised vision statement for the updated General Plan from the input received by the various approaches used in the Public Participation Plan.
4. Conduct visioning workshops, stakeholder meetings, and/or other public meetings as identified in the Public Participation Plan in such a manner that encourages interaction and public input. Conducting the meetings includes, and may not be limited to, preparing notices, preparing meeting material, providing large scale color maps and visuals, providing attendee contact information, and documenting the input for retention purposes. Town staff will manage any Town media sources such as the Town websites, Town Newsletter, and local newspapers.
5. Prepare meeting minutes for all workshops, stakeholder meetings and/or other public meetings per the Public Participation Plan. Input shall be recorded and addressed in the plan or an explanation as to why the comments were not addressed is to be provided, in writing, to Town staff. The consultant will be responsible for all preparation required and meeting coordination for said meetings (i.e. attendee sign-in sheets, meeting setup). The consultant is also responsible for the development of meeting notification material, (i.e. press release and meeting flyers). Town staff will be responsible for the coordination of location, issuing press releases via Town Newsletter, and notifying the public. Also, Town staff will prepare meeting minutes for any Planning Commission and Town Council meetings.
6. Prepare future projections and impacts based on the elements in the updated General Plan that will be included as part of the background report or appendix. This may include, and is not limited to, the following: land use assumptions on future land use, density, and development intensity; identification of relevant sustainable development trends that may impact the Town of Carefree, such as impacts on circulation and parking from autonomous vehicles and ridesharing; other green and/or technology infrastructure; population projections; and housing type data.



❖ **PHASE 3: DEVELOPMENT OF GENERAL PLAN 2040 DRAFT**

**The Consultant Shall:**

1. Prepare a General Plan draft for staff and stakeholder review, which shall include the following:
  - a. Include an introduction, elements as required by ARS § 9-461.05 and an implementation section and glossary section;
  - b. Provide an implementation section that considers aspects of the Town's Capital Improvement Program (CIP);
  - c. Consider a different plan format, adding/removing elements or components, and/or combining elements based on Phase 1, Project Start-Up, and Phase 2, Visioning and Gathering Input. The Town's existing General Plan has eight (8) elements: Land Use, Circulation, Open Space, Growth, Environmental, Cost of Development, Water Resources, and Public Services and Facilities;
  - d. Consider drafting and reviewing elements individually or in groups to make the process manageable for consultants, reviewers and the public;
  - e. Draft a plan that is easy to use, easy to read and easy to understand. Design the plan to be inspiring visually, graphically and intellectually;
  - f. Present the General Plan draft and/or elements for review and input in a manner that is consistent with the adopted Public Participation Plan;
  - g. Provide opportunity for periodic Town Council and Planning Commission updates and/or review of the General Plan draft, draft plan components, and/or preliminary plan drafts; and
  - h. Prepare a complete draft plan at each stage of the review and approval process for staff and the public reviewing body. Each new draft shall include all up-to-date edits and changes agreed upon by the previous reviewing body along with an updated comment matrix. Based on the Town Council action, the consultant may be required to make final edits or other changes to the General Plan prior to the Plan being submitted for ratification by the public in November 2024.
2. Create the artwork (maps, graphics, photos and visuals) for the updated General Plan. Maps and visuals may be provided in PDF format during Phases 1 through 4, unless directed otherwise by Town staff. All visuals that include such items as charts, tables, maps, and cross-sections in the General Plan shall be in an editable format acceptable to the Town.

❖ **PHASE 4: PUBLIC BODY RECOMMENDATION AND APPROVAL**

**The Consultant shall:**

1. Assist Town staff with the coordination and material for the sixty (60) day notice noticing to agencies and other local governments for review and comment of the updated General Plan draft in conformance with the Arizona Revised Statutes, including Maricopa County, Cities of Scottsdale and Cave Creek, Maricopa Association of Governments and related Committees such as the Population Technical Advisory Committee and the Transportation Policy



Committee, Arizona Commerce Authority, Arizona Department of Water Resources, Arizona State Land Department, as well as other regional, state and federal agencies, and any person or entity that requests in writing a copy of the proposed plan.

2. Prepare an executive summary of the updated General Plan at least thirty (30) days prior to the Planning Commission action of the General Plan for Town staff review and approval, with any revisions made to this summary as the General Plan completes Phase 4, Public Body Recommendation and Approval
3. Prepare, make revisions to the General Plan, and attend a minimum of four (4) Planning Commission meetings during Phase 4, Public Body Recommendation and Approval. These minimum meetings include three (3) work sessions and one (1) meeting at which the Planning Commission votes on a recommendation of the General Plan draft to the Town Council. Participation by the consultant will require preparation of the General Plan draft, drafting plan components, any related requested research from the work session(s) and may require presentation and/or addressing questions.
4. Prepare, make all recommended revisions to the General Plan after the Planning Commission meeting(s), and attend a minimum of three (3) Town Council meetings during Phase 4, Public Body Recommendation and Approval. These minimum meetings include two (2) work sessions and one (1) meeting at which the Town Council votes on the 2022 General Plan draft. Participation by the consultant will require preparation of the 2022 General Plan draft, drafting plan components, any related requested research from the work session(s), and may require presentation and/or addressing questions.
5. Draft the final General Plan, making all recommended changes, after completion of Phase 4, Public Body Recommendation and Approval.

#### ❖ PHASE 5: VOTER RATIFICATION

##### **The Consultant shall:**

1. Be aware, and if necessary, adjust the project scope accordingly to meet the Town's goal in placing the General Plan on the November 2024 ballot. Town staff will make most of the necessary arrangements to place the General Plan on the ballot. However, the consultant's proposal should include an option to assist with promotion of the General Plan.
2. Include in the consultant's proposal an option to assist Town staff with promotion of the General Plan which may include, and not be limited to the following:
  - a. Prepare a general description of the General Plan and its elements in a Town pamphlet, with copies available in at least two locations accessible to the public;
  - b. Continue to reference and update the Town's website;
  - c. Add flyers to utility bills regarding the upcoming vote;
  - d. Continue to post the schedule of meetings on the website and Town bulletin board;
  - e. Place static displays at Town facilities; and
  - f. Prepare, promote, and deliver a public outreach program to homeowners' associations and other community groups.





#### ❖ **PHASE 6: PROJECT CLOSE OUT**

##### **The Consultant shall:**

1. Provide the final General Plan document and any associated appendices in an electronic, editable format acceptable to the Town within thirty (30) calendar days after Town Council approval of the General Plan. This format shall allow for the ease of making hard copy prints of the General Plan and appendices. There shall be at least two versions of the General Plan, one version in PDF and one version in Microsoft Word.
2. Provide all final artwork, including but not limited to, such items as graphic, photos, charts, tables, maps, and cross-sections in the General Plan shall be in an editable format acceptable to the Town. Photos shall be in JPEG format.
3. Provide the executive summary, background report or appendices that includes all the primary General Plan drafts, visioning and public input material, public outreach materials and pamphlets, noticing, and associated project material in PDF format.

#### **SECTION 1.2: OTHER TASKS**

##### **The Consultant shall:**

1. Be available to attend and may require providing information for regular briefings during the project to the Town Council and/or Planning Commission to keep them informed of actions concerning the development of the update to the General Plan. The proposal should include a total of at least four (4) briefings to either the Planning Commission and/or Town Council.
2. Indicate in the proposal any additional tasks that add value and will enhance the General Plan process that are currently not included in the scope of work. The scope should clearly identify tasks, if any, which the Town of Carefree will be responsible to do.
3. Include an option and/or fee should the consultant be needed at additional Planning Commission and Town Council meetings.

#### **SECTION 1.3: DELIVERABLES**

The proposal from the consultant shall take into consideration the following deliverables, although the Offeror may identify additional deliverables within their proposal:

1. A Public Participation Plan that meets or exceeds Arizona Revised Statutes and the Town's Citizen Participation Ordinance.
2. A background report or appendix on existing and proposed trends related to the elements in the General Plan. Town staff will assist the consultant with available data.
3. An informational brochure of Frequently Asked Questions (FAQs) about the General Plan.
4. A General Plan in a finished format for ratification. The consultant should expect to produce three (3) complete draft plans of the General Plan, in addition to making edits and changes between draft plans as the draft plan moves to the different bodies reviewing, making recommendation, or approving the General Plan.
5. An executive summary of the General Plan at least thirty (30) days prior to the Planning Commission action of the General Plan update for Town staff review and approval, with any





revisions made to this summary as the draft General Plan completes Phase 4, Public Body Recommendation and Approval.

6. A Town pamphlet with a general description of the General Plan and its elements for use during the voter ratification phase.
7. Physical copies of the General Plan, background report or appendix, executive summary, voter ratification pamphlet, and any plan components, artwork, maps or visuals. The consultant proposal shall indicate the number to be provided and a per unit cost should additional copies be required.

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## **PROPOSAL EVALUATION**

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### **EVALUATION CRITERIA**

All Proposals shall be evaluated by an Evaluation Panel using the weighting and criteria listed below. The recommendation for Contract Award will be made to the Offeror whose proposal is determined to be the most advantageous to the Town when applying the following criteria and weighting.

The following is the weighting of criteria that will be used to review the Proposals:

<b>PROPOSAL EVALUATION CRITERIA</b>	<b>WEIGHT (100 POINTS)</b>
Methodology	45
Experience/Expertise and References	35
Cost of Services to the Town	20

Each Proposal will be reviewed in its entirety and assigned a score with respect to each of the criteria. The Proposals will be ranked by the Evaluation Panel according to their total weighted ranking. The Town reserves the right to consider historic information and facts, whether gained from the Offeror's proposal, questions and answer conferences, references, or other source and the views of the evaluator(s) with prior Contract or service delivery experience with any of the Offerors, while conducting the proposal evaluations.

The Evaluation Panel may establish a short list of those Proposals considered most advantageous to the Town. Those Offeror's short-listed by the Panel may be requested to attend an interview.

**Award of Project and Approval of Contract:** Once the top consultant has been determined, Town staff will start contract negotiations with the consultant. If contract negotiations are not successful, the second ranked consultant may be asked to negotiate a contract with the Town.



Award of a contract to the successful Offeror is subject to funding approved by the Carefree Town Council. The Town reserves the right to negotiate the terms of an agreement for the General Plan Update project with one or more Offerors, as the Town deems fit and most advantageous to the Town’s completion of the project.

**SOLICITATION TIMELINE:**

The solicitation, receipt, and evaluation of submittals and the selection will conform to the following schedule:

Request for Proposal Issued	August 3, 2022
Pre-Proposal Conference	August 10, 2022
Deadline to Submit Questions (4:30 pm deadline)	August 12, 2022
Deadline for RFP Submittal (2:00 pm deadline)	August 29, 2022
Shortlisting of Offerors	September 6, 2022
Interviews (if necessary)	Week of September 12, 2022
Deadline for Evaluation, Selection	Week of September 19, 2022
Contract Negotiation	September 26, 2022
Contract Approval by Town Council	October 3, 2022
Notice to Proceed	October 7, 2022

(Note: All dates are subject to change.)

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**PROPOSAL FORMAT AND REQUIRED RESPONSES**

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Firms interested in providing these services must submit a proposal that addresses the following items. Failure to provide any of the information requested by these paragraphs may be grounds for the Town to reject a proposal.

**Proposal Format:**

1. All proposals shall include the Town forms and be in the format as outlined in the “Scope of Work” of this Request for Proposal. Proposals are limited to 8 1/2" & 11" pages of one-sided text or graphics.
2. A maximum of twelve (12) pages of information total is highly recommended. An Appendix of resumes for proposed team participants shall be included (in addition to the 12-page limit). Likewise, the required Town forms in the RFP (Cost Sheet, Questionnaire and Affidavit) shall be in addition to the 12-page limit. Text size shall be no smaller than 11 points.
3. Applicant shall provide five (5) copies of the proposal and cover letter total.



**In order for the Town to conduct a uniform review process, all proposals should be submitted as follows:**

1. **Cover Letter:** The proposal shall be transmitted with a cover letter. The cover letter does not count in the page limit listed below. The letter must include:
  - a. A statement of the Offeror’s understanding of the services required by the Scope of Work and the consultant’s interest and commitment to the proposed project.
  - b. A statement that the proposal shall be valid for a 90-day period and should include the name, title, address and telephone number of the individual to whom correspondence and other contacts should be directed during the consultant selection process.
  - c. The person authorized by the consultant to negotiate a contract with the Town shall sign the cover letter.
  - d. The name of the prime and supportive firm(s) and the project manager.
2. **Table of Contents:** The Table of Contents must indicate the material included in the proposal by section/task and page number. A proposal’s table of contents should mirror the “Scope of Work” and must include all the items set forth in this section of the Request for Proposal.
3. **Detailed Proposal/Methodology:** This section shall clearly convey the consultant understands the Scope of Work, including coordination with the stakeholders, the community, other agencies and approvals from the Town. The Town Selection Committee will rate the proposal on the understanding of the Scope of Work, comprehensiveness of the response to the RFP, creativity and professionalism of the approach in addressing the issues and needs in the RFP, the submitted schedule, and project budget.
  - a. Describe your preliminary approach methods and plan to carry out the Scope of Work. Describe the anticipated interaction with Town Staff. Items to be included are as follows:
    - Provide a proposed scope and schedule to complete the project beginning from the issuance of a notice to proceed to the completion of the adopted plan. Discuss how subcontracted staff, if any, will participate in the implementation defined by the Scope of Work. The scope shall include all items identified in the Scope of Work along with any additions, the consultant deems as adding value to the project.
  - b. The proposal shall provide a staffing plan (detailed by major task) required for providing professional services for the General Plan Update. Discuss the workload, both current and anticipated, for all Key Team Members, and their capacity to perform the requested services according to your proposed staffing schedule. Key team members are expected to be committed for the duration of the project. Replacement of key team members will not be permitted without prior consultation with and approval of the Town.
4. **Firm/Project Team Roles:** Provide a brief description of the submitting firm or firms that comprise the consultant team for the project. Identify the specific roles for each firm/project



team and the key personnel who will be assigned specifically to this project. Identify specific experience for the firm(s)/project team on similar or related projects that you believe closely reflects this project specified in the Scope of Work and provide a brief description of the services provided by the firm(s)/project team in those projects.

5. **Qualifications of the Firm/Project Team:** Vendors must demonstrate proven knowledge and experience in providing the services, including deliverables, described in the Scope of Work. Please provide a list of projects where the firm(s)/project team has provided such services for municipalities comparable in size and business function to the Town of Carefree. In addition to this information, the Qualifications of the firm must include:
  - a. Number of years the prime company and supportive firm(s) have been in business in Arizona
  - b. A brief description of the company size and organization
6. **Relevant Experience/Expertise and References:** From the list of project experience mentioned above provide details on at least three (3) projects of your choice with a comparable scope, size, character and complexity (particularly for the Project Manager and the managers of key disciplines). The projects referenced should be within the last five (5) years of this RFP submittal date. Each project must include at least one reference. The reference must include the contact name, organization, phone number, and e-mail address using the form provided in the questionnaire section of this RFP.
7. **Personnel:** In this section, please identify all the individuals who will be part of the project team as well as the Project Manager. Provide their qualifications and relevant experience (including subcontracted staff that may be involved in this project), time commitment to this project, and resumes for those individuals assigned to this project. If detailed staff resumes are provided, they should be included in the appendix. In addition, provide the following information on the project personnel:
  - a. A project team table/chart should be provided that clearly identifies which proposed personnel would be responsible for each specific tasks described in the Scope of Work, estimate of total project hours per task and member, and their rate/hour.
  - b. For each key person identified, list their length of time with the firm and at least three comparable projects in which they have played a primary role. If a project selected for a key person is the same as one selected for the firm, provide just the project name and the role of the key person. For other projects provide the following: description of project, role of the person, contract dates, project owner, and reference information.
8. **Cost Proposal:** This section shall identify the fees, including an estimate of any expenses, to complete the Scope of Work outlined in this RFP. When evaluating all the proposals, the consultant proposal with the lowest fees will receive the maximum number of points. The



Town has a maximum budget of \$125,000 for the General Plan Update; with this budget split between two (2) fiscal years. In your response, please provide a full description of the expected expenditure of funds for the proposed work within each fiscal year. The Town prefers preliminary work to be completed in fiscal year 22-23, with a greater allocation of expenditures to be incurred in fiscal year 23-24. The cost breakdown should include, but is not limited to, the following:

- a. **Task Budget:** a breakdown of expenses by task and key personnel, to ensure a full understanding of resources committed to this work. The task budget should also address the scope of work as described in this document and include any possible optional tasks.
  - b. **Billing Rate Breakdown:** Please provide a breakdown of billing rates (direct labor, overhead, fee, etc.).
  - c. **Community Outreach:** Provide a project budget, separating out the costs for the community outreach component as a specific category.
9. **Project Time Schedule:** Submit a recommended project schedule that identifies the project tasks corresponding with their duration, project milestones, and deliverable submittals. The schedule should show the dependencies, relationships, and timing of each task relative to each other. It should also include and indicate the time for Town to review and comment on draft deliverables, the public body review and approval process, and the voter ratification deadlines.
10. **Disclosures:** Disclose any professional or personal financial interest, which could be a possible conflict of interest in providing products and services to the Town of Carefree.
11. **Additional Information:**
- a. Certification as a minority owned, women owned, or disadvantaged business enterprise, if applicable.
  - b. Any additional information the Offeror would like to submit reflecting on the firm or team's ability to perform the tasks described in this RFP.
  - c. Offeror shall identify any exceptions taken to the terms and conditions as specified in this solicitation document, any award documents, or attached contracts. All exceptions taken by the Offeror shall be clearly defined and the changes requested clearly identified in their submittal document. The proposed Form of Contract is included as part of this Solicitation. In your Proposal document you must include a statement that you have reviewed the contract and list any exceptions. Exceptions taken by the Offeror shall be used in the evaluation process. If the Offeror does not indicate exceptions in their submittal document this will signify to the Town that the Offeror is in full agreement with all areas of the solicitation document, attached award documents and contracts, and agree to all terms as stated. An RFP response that takes exception to a



material requirement of any part of the Solicitation, Specifications or proposed Form of Contract, may be rejected as non-responsive.

12. **Proposal Signature Page:** To be considered a Responsive Proposal, the Offer and Acceptance Form/Proposal Signature page must be signed and dated by an Authorized Representative(s) eligible to sign contract documents for the party and is part of the original bid/proposal submittal due at the stated due date and time indicated in the solicitation. Failure to return the Offer and Acceptance Sheet and to sign it is grounds for the Town to reject a proposal.
13. **Reference Form:** Fully completed Reference List. List three (3) references from public agencies/entities, whom the Town may contact regarding work your consultant/firm completed under a similar scope as this Request for Proposal, during the past three years. Include the length of any contracts listed.



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**COST PROPOSAL FORM**

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**COMPANY NAME:** \_\_\_\_\_





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**PROPOSAL SIGNATURE PAGE**

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The undersigned hereby offers and agrees to furnish the material, or service, in compliance with all the terms and conditions, instructions, and any amendments contained in this Request for Proposal document.

_____ Company Name	_____ Signature of Authorized Person
_____ Address	_____ Printed Name
_____ City	_____ Title
_____ State	
_____ Telephone Number	_____ Fax Number
_____ Date	_____ E-Mail Address

Proposal must be signed by a duly authorized representative eligible to sign contract documents for the firm. Consortiums, joint ventures, or teams submitting proposals will not be considered Responsive Proposal(s) unless it is established that all contractual responsibility rests solely with one Consultant or one legal entity. The Proposal must indicate the responsible entity.

Offerors should be aware that joint responsibility and liability will attach to any resulting contract and failure of one party in a joint venture to perform will not relieve the other party or parties of total responsibility for performance.



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**REFERENCE FORM**

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**Please list a minimum of three (3) owner references from similar projects whom the Town may contact:**

1. Company: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Project Name: \_\_\_\_\_  
Project Cost: \_\_\_\_\_  
Project Description: \_\_\_\_\_  
\_\_\_\_\_
  
2. Company: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Project Name: \_\_\_\_\_  
Project Cost: \_\_\_\_\_  
Project Description: \_\_\_\_\_  
\_\_\_\_\_
  
3. Company: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Project Name: \_\_\_\_\_  
Project Cost: \_\_\_\_\_  
Project Description: \_\_\_\_\_  
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## SELECTION PROCESS AND SCHEDULE

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The Evaluation Panel will assess each proposal according to the criteria set forth in this RFP. The Town may perform a due diligence process for the companies receiving the highest evaluation on their proposals. Finalists may be invited to participate in an interview process with the selection panel. The Town reserves the right to select a company based upon the proposal submittals only and not proceed to the interviews.

The Panel will outline their recommendation and present the draft contract the Town Council upon the conclusion of the selection process. At which time, the Town Council will consider entering into the contractual agreement with the successful agency to perform the General Plan Update. The Town reserves the right to cancel the contract if agreed upon terms within the contract are not met.

**The entire proposal must be submitted no later than Monday, August 29, 2022 at 2 p.m.. The proposal may be hand delivered to the Town Hall – Administrative Offices located at 8 Sundial Circle or may be mailed to Attn. Stacey Bridge-Denzak, Planning Director, PO Box 740, Carefree, Arizona 85377 (those mailed and received after Monday, August 29, 2022 will be disqualified). Electronic submittals will not be accepted.**

It is anticipated that interviews with the short-listed agencies will be held in September of 2022.

To avoid disclosure of contents that may be prejudicial to the competing agencies during the selection process, all information received by the Town in response to or contained in the proposals will be confidential. The proposals will be open to public inspection after the contract is awarded by the Town Council.

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## GENERAL TERMS AND CONDITIONS

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This RFP does not commit the Town to entering into any agreement, to pay any cost incurred in the preparation of a Proposal in response to this request or in subsequent negotiations, or to procure a contract for the project.

1. **Withdrawal of Proposals:** At any time prior to the specified time and date set for the proposal's submission, a Offeror, or the Offeror's designated representative, may withdraw a proposal.
2. **RFP Questions and Clarifications:** Questions and clarifications on the RFP and its requirements can be addressed at the Pre-Proposal Conference (see the cover sheet for the date/time/location) or can be submitted to the Contract Administrator, Stacey Bridge-Denzak, in writing via e-mail ([stacey@carefree.org](mailto:stacey@carefree.org)) by 10:00 a.m. MST on Friday, August 12, 2022. E-mailed questions and written responses will be shared with all those firms/teams that have expressed an interest in the Project. Indicate your interest by e-mailing the Contract Administrator at the address listed above.



3. **Reservation of Rights by Town:** The issuance of the Request for Proposals and the acceptance of proposals does not constitute an agreement by the Town that any contract will actually be entered into by either party. The Town expressly reserves the right to:
  - a. Reject any or all proposals.
  - b. Reissue a Request for Proposals.
  - c. Extend the time frame for submission of the proposals by notification to all parties who have registered an interest in this Request for Proposals.
  - d. Request more information from any or all Offerors. The commencement of contract negotiations does not commit the Town to accept the proposed terms included in the contract. Terms of any contract will be agreed upon during negotiations but must be approved by Town Council. Negotiations may be terminated by the Town for failure to reach mutually acceptable terms.
  - e. Negotiate with any qualified Offeror.
  - f. Waive any immaterial defect or informality.
4. **Proposals Become Public Records:** The confidentiality of the Proposals will be maintained until the submittal deadline. Upon opening, the Proposals become the property of the Town. After the selection process is complete, the Proposals become part of the public record and are subject to public records requests. Requests for nondisclosure of data such as trade secrets and other proprietary data must be made known in writing to the Town in the submitted Proposal and the information sought to be protected should be clearly marked as proprietary.
5. **Right to Disqualify:** The Town reserves the right to disqualify any Offeror who fails to provide information or data requested herein or who provides materially inaccurate or misleading information or data. The Town reserves the right to disqualify any Offeror on the basis of any real or apparent conflict of interest that is disclosed by the Proposals submitted or any other information available to the Town. Disqualification is at the sole discretion of the Town.
6. **Contract Negotiation:** This will be a qualifications-based Team selection using the point rankings from the criteria outlined above. The Town anticipates interviewing the top ranked Teams based on the Proposal rankings before making a final Team selection. Interview criteria will be provided to the shortlisted teams. The Town reserves the right to select a Team directly after the Proposal rankings without performing interviews.

The Town will enter into negotiations with the team deemed most qualified coming out of the interviews and/or Proposal reviews. If an agreement on the terms of the contract fee cannot be reached with the most qualified firm, the Town will enter into contract negotiations with the second most qualified firm, and so forth. The Town reserves the right, at its sole discretion, to withdraw this Request for Proposals and/or to reject any or all Proposals.

In the case of a default by the successful responder, the Town may procure the services from other sources.



7. **Indemnification:** By submission of a Proposal hereunder, the Offeror and each member of its Team agrees to hold the Town's Mayor, Council Members, officers, agents, employees and attorneys free and harmless against any and all liability, including costs of claims, suits and counsel fees arising from, growing out of, or incidental to, the actual or alleged use of any copyrighted composition, secret or proprietary process, patented or unpatented invention, or article or appliance.
8. **Applicable Law:** Any and all disputes arising under any contract to be negotiated hereunder or out of the proposals herein called for shall be governed according to the laws of the State of Arizona, and the Offeror shall agree that the venue for any such action brought to enforce provisions of the contract shall be in the State of Arizona.

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### **GENERAL INFORMATION**

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**Instructions:** The Town of Carefree will not be held responsible for any oral instructions.

**Town Rights:** The Town of Carefree reserves the right to reject any or all Request for Proposals (RFP), to waive any informality or irregularity in any proposal received, and to be the sole judge of the merits of each respective proposal received.

**Release of Proposals:** The Town will provide the release of all public information concerning the proposal, including the selection announcements and subsequent agreements upon the award of contract by Town Council.

**Questions:** Questions related to the selection process should be directed to:

**Stacey Bridge-Denzak, Planning Director - Town of Carefree**

8 Sundial Circle

PO Box 740

Carefree, Arizona 85377

Phone: 480-488-3686

Fax: 480-488-3845

Email: [stacey@carefree.org](mailto:stacey@carefree.org)