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REQUEST FOR PROPOSALS

Planning for Diocesan House & Property

ISSUE DATE: MAY 1, 2021

Direct All Questions Concerning This Request To:

The Reverend Sarah Ball-Damberg, Chair Building Task Force Committee

sarah@holyfamilych.org or 919-491-1416

and

The Right Reverend Sam Rodman, Bishop Diocesan of North Carolina

sam.rodman@episdionc.org

1. Introduction

The Trustees of the Episcopal Diocese of North Carolina invite firms to submit qualifications for consulting services to undertake a planning and feasibility study for the Diocesan House property located on the 200 block of West Morgan Street, Raleigh. The Diocese seeks to engage a planning team to provide facilitation of a discernment process and technical services. The Diocese reserves the right to procure the services described in this solicitation document from firms at its sole discretion.

A qualified team of design, planning, engineering, community engagement, and market analysis experts will be selected based on proven excellence in preparing studies that encompass the following elements:

- Strategic community and stakeholder engagement; expertise in engaging faith communities preferred
- Planning, urban design, and placemaking strategies
- Market analysis and development economics
- Order of magnitude cost estimating for physical improvements and implementation strategies

The Diocese will take responsibility for supporting the engagement strategy, including meeting logistics and promotion. The consultant team(s) will produce technical documents and memoranda, analysis, and plan graphics; final report text and recommendations; and will assist with leading key meetings/charrettes and Diocesan and local community engagement design and facilitation. Consultant services will be required from the date of a fully executed contract(s) through a 12-month period following Notice to Proceed, or the date of successful completion of performing the tasks and work products defined in this RFP.

The consultant team(s) must be able to deliver planning services working in collaboration with the Diocese, the Trustees, Diocesan Council, Standing Committee, and the Building Task Force Committee and external parties such as City of Raleigh and Wake County governmental entities, among others.

2. Project Background

We are 49,000 people gathered into 111 congregations and 10 campus ministries throughout 38 counties in the central part of North Carolina, from Iredell County to Edgecombe County, and from Caswell County to Scotland County. On an average Sunday, more than 13,500 gather to worship across our diocese.

Our vision as a diocese is to be a community of disciples committed to following Jesus Christ into the dream of God for us and for all creation, in becoming Beloved Community.

Our mission is simple: Empowered by the Holy Spirit, the Diocese of North Carolina seeks to live God's dream by making disciples and making a difference. We do so by practicing the Way of Love and building joyful congregations and other communities of faith into Beloved Community, centered on the Gospel, in the communion of The Episcopal Church. We go forth, as apostles, to offer God's reconciling love to all persons, with special concerns for the unchurched, young people and those on the margins of society.

Currently, we are exploring 21st century Galilee, the pluralistic, ever-changing modern world in which we live. In this modern mission field, both our diocese and our local congregations seek out new ways to go out into their communities, doing church in new ways, meeting people where they are and sharing the love of Christ. We do this by intentionally sharing our faith, seeking out new communities in which to minister and finding new ways to work with our local neighbors. Sometimes we also engage in special initiatives, like engaging our young people in the work of reconciliation and supporting our neighbors who work in the agricultural fields.

Our five priorities - Racial and Social Justice; Congregational Support; Formation; Collaboration and Partnerships; and Creation Care - represent the multi-year mission strategy of the diocese, which ultimately led to the Galilee vision we embrace today.

Our diocese functions under a bishop, the Right Reverend Samuel Rodman. The Right Reverend Anne E. Hodges-Copple is the bishop suffragan. The Diocese is divided into seven convocations, each headed by a dean and a lay warden.

We are one of three dioceses in North Carolina, including the Diocese of East Carolina and the Diocese of Western North Carolina, and one of 110 dioceses that make up The Episcopal Church, a community of 2.4 million members in the United States and abroad. The Episcopal Church is headed by a presiding bishop, currently the Most Rev. Michael Curry.

We are also part of the Anglican Communion, a global community of 74 million persons in 38 member provinces throughout the world, headed by the Archbishop of Canterbury, currently the Most Reverend and Right Honorable Justin Welby.

The Trustees of the Diocese are the legal representative of the Diocese with regard to all matters pertaining to its corporate property. The basic responsibilities of the Trustees are to manage the assets of the Diocese.

The current Diocesan House was acquired in 2014 and is a 20,600 square foot, three-story office building located on 0.66 acres and built in 1958. The Diocese uses about one third of the square footage for its own offices and has until recently leased the remaining space.

Demand for downtown Raleigh real estate continues to be strong. There is a lot of change happening around Diocesan House. Significant public investment by the city is ongoing and includes:

- [Raleigh Civic Campus](#), directly south of Diocesan House;
- [Raleigh Union Station Phase II](#);
- Implementation of [Bus Rapid Transit Service](#).

Private investment is at least as equally robust. Details about private projects are available on the Downtown Raleigh Alliance [website](#).

Previous Efforts

The Diocese organized a Building Task Force in 2019 to discern the future of Diocesan House. The Task Force has met faithfully for more than two years and in that time has been working to discern options for the building and land that comprise Diocesan House.

Constraints

There are a handful of constraints that will shape planning for Diocesan House. First and foremost, any plan must be faithful to the Diocese’s mission. The legal constraint in place is City of Raleigh zoning, Downtown Mixed Use - 20 story height limit - Urban General Frontage.

Goals and Objectives

The purpose of planning for Diocesan House and its property is multifaceted. The Building Task Force expects thoughtful engagement of the Diocese and community partners as part of the planning process. Through this process the Diocese seeks to better understand:

- Pros and cons of selling, reinvesting in, or redeveloping Diocesan House, and how each of those options could further our mission.
- Short-term strategies for how to utilize and/or improve the existing building
- Potential for redevelopment:
 - Gross square foot capacity by-right of the 0.66 acres currently owned by the Diocese
 - Current and projected parking need, regulatory requirements, and strategies to meet future need.
 - Whether or not a rezoning request might successfully result in a significant increase in development capacity of Diocesan property.
 - What uses are feasible based on a high-level market analysis.
 - How new construction could be organized on the property to best advantage (massing study or simple illustration).
- What organizations or communities would make good partners as we undertake this work.

3. Response Timeline

The RFP process is expected to follow this timeline:

Milestone	Date
RFP Distributed	May 1, 2021
Written Questions Due	May 15, 2021
Diocese Responds to Questions	May 24, 2021

RFP Due Date	June 7, 2021
Interviews (if necessary)	June 2021(exact dates TBD)

4. Questions

Upon review of the RFP documents, potential offerors may have questions to clarify or interpret the RFP in order to submit the best qualifications possible. To accommodate the questions process, offerors shall submit any questions by the above Written Questions Due date. All questions should be submitted in writing via email to the Reverend Sarah Ball-Damberg no later than the due date noted above. Please include in the subject line: Diocesan House RFP. A summary of all questions and answers will be distributed to all firms that initially received the RFP directly from the Diocese by the above Diocese Responds to Questions date.

5. Submission of Proposals

Proposal responses shall be limited to twenty (20) 8 1/2” x 11” double sided pages, for a total of no more than forty (40) printed pages (front/back covers, Table of Contents, tab pages and resumes are excluded from these totals). Double-sided with page numbers is preferred.

Proposers must submit one (1) signed original plus one (1) electronic version of the qualifications response. The electronic version of the qualifications must be submitted as a viewable and printable Adobe Portable Document File (PDF) on a flash drive, with the proposal. Response must be enclosed in a sealed envelope or package and clearly marked: Planning for Diocesan House. Both hard copy and electronic versions must be received at Diocesan House on or before (4:00) PM EST on the RFP Due Date. Deliver proposals by US Postal Service or any other means to the address:

**The Reverend Sarah Ball-Damberg
 Episcopal Diocese of North Carolina
 200 West Morgan Street
 Raleigh, NC 27601-3719
 ATTN: Planning for Diocesan House**

Proposals received after the RFP Due Date above will not be considered. The Diocese reserves the right to reject any or all proposals for any reason and to waive any informality it deems in its best interest. Any requirements in the RFP that cannot be met must be indicated in the response. Offerors must respond to the

entire request. Any qualifications received by the Diocese that are incomplete in their responses may be disqualified.

6. Rights to Submitted Material

All proposals, responses, inquiries, or correspondence relating to or in reference to this RFP, and all reports, charts, and other documentation submitted by Offerors (other than materials submitted as and qualifying as trade secrets under North Carolina law) shall become the property of the Diocese when received.

The Diocese reserves the right to retain all responses submitted and to use any ideas in a response regardless of whether that response is selected. Submission of a response indicates acceptance by the offeror of the conditions contained in this Request for Qualifications.

7. Expenses

The Diocese will not be responsible for any expenses incurred by any offeror in the development of a response to this Request for Qualifications or any other activities associated with this procurement including but not limited to any onsite (or otherwise) interviews and/or presentations, and/or supplemental information provided, submitted, or given to the Diocese and/or its representatives. Further, the Diocese shall reserve the right to cancel the work described herein, prior to issuance and acceptance of any contractual agreement/purchase order by the recommended offeror.

8. Acceptance

Submission of any response indicates a consultant's acceptance of the conditions contained in this RFP unless clearly and specifically noted otherwise in the response. Furthermore, the Diocese is not bound to accept a submittal, and further, the Diocese has the sole discretion and reserves the right to cancel this RFP, and to reject any and all proposals, to waive any and all informalities and/or irregularities, or to re-advertise with either the identical or revised specifications, if it is deemed to be in the Diocese best interests to do so. Moreover, the Diocese reserves the right to make no selection if proposals are deemed to be outside the fiscal constraint or not in the best interest of the church.

9. Statement of Qualifications & Proposals

The RFP comprises this document, any attachments, and any addenda released before

the RFP Due Date. All attachments and addenda released for this RFP are incorporated herein by reference.

Responses should follow the format outlined herein. The Diocese may reject as non-responsive at its sole discretion any response or any part thereof that is incomplete, inadequate in its response, or departs in any substantive way from the required format. Proposal responses shall be organized in the following manner:

Cover letter/ Letter of Intent

Introduction Letter with intent as it may pertain to the Request for Qualifications

Background and Experience

This section should include background information on the response consultant team and give details of experience with similar projects. Applicants should provide background information on at least three projects for which the Consultant and/or a Consultant team's firm was primarily responsible for conducting projects with similar scope of work. Each summary should include the following, as applicable:

- Description of the project.
- Description of services provided by the Consultant or team firm.
- Indicate whether prime consultant or sub consultant on project.
- Associated firms involved and their assigned responsibilities.
- Key principal and associated staff involved, along with the staff assigned responsibilities.
- Project schedule (initial schedule and actual/final schedule), including an explanation of delays, if any.
- Description of role in internal stakeholder coordination and outreach approach.
- Project references including names, addresses, and telephone numbers.

A list of three (3) references (including contact persons and telephone numbers) for which similar work has been performed shall be included, and the list shall include all similar contracts performed by the Proposer in the past five years. The evaluators reserve the right to contact all the references listed. The failure to list all similar contracts in the specified period may result in the rejection of the Proposer's proposal. The evaluators may check all public sources to determine whether Proposer has listed all contracts for similar work within the designated period.

Project Understanding, Approach, and Schedule

This section shall include, in narrative, outline, and/or graph form the Proposer's approach to accomplishing the tasks outlined in the Scope of Work section of this RFP. A description of each task and deliverable and the schedule for accomplishing each shall be included. Consultants should demonstrate the following:

- Process for gathering data and defining the goals and vision for the project.
- Process for identification of base conditions and evaluation of alternatives.
- Process for completing the Market Analysis.
- Past experience in facilitating faith community engagement.
- Realistic plan for completing the planning process in the timeframe desired by the Diocese.
- Personnel, management tools, techniques, and procedures used to maintain project schedules.
- Demonstration of resolving conflicts and building consensus within faith groups.

Team Organization, Experience and Certifications/Qualifications

This section must include the proposed staffing, deployment and organization of personnel to be assigned to this project(s). The Proposer shall provide information as to the qualifications and experience of all executive, managerial, legal, and professional personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person. In addition to above, consultants should include:

- Team organizational chart showing all firms, contractual relationship between firms and names of specific staff proposed for the project with their titles.
- Specific responsibilities should be listed for all team members assigned to the project(s). The description of responsibilities shall include the estimated percentage of the total project(s) that is to be completed by each individual team member.

Participation Methods and Faith Community Consensus Building

Consultants should demonstrate previous examples of successful engagement techniques and outreach strategies involving multiple stakeholder groups. Consultants should highlight any work with religious institutions, successful examples of building consensus within faith communities, and experience with public involvement including conducting public meetings, social media, online process, public facilitation techniques, and other innovative public process involvement.

Current Workload

In this section please list current projects and schedules for completion. Listing of current projects of your firm's current workload, list whether you are the prime or sub-consultant, percentage of the project complete and schedule for completion.

Rate Schedule

Hourly rate schedule for all personnel who will work on the Project and estimated percentage of the project for which each individual will be responsible. Compensation will be negotiated with the Consultant.

Pending Lawsuits

Listing of any pending or settled lawsuits in which the Consultant or team firm was involved during the past five years.

Technology

Technology requirements should generally include: Adobe Design Suite, Geographic Information Systems (GIS), CAD software, programming, project management and scheduling software. Consultants should use this section to also list any innovative strategies and creative processes that may be used as tools for successful project planning.

10. Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Team organization and experience.
- Project personnel qualifications.

- Specialized or appropriate expertise in the type of project.
- Past performance of the lead consulting firm, subconsultants, and members of the project team on similar projects.
- Demonstrated experience in facilitating congregational engagement.
- Adequate and experienced staff and proposed team for the project.
- Inclusion and level of MWBE participation.
- Recent experience with successfully maintaining project schedules and budgets.
- Current workload and firm capacity.
- References.
- Project Understanding and proposed approach for the project.
- Demonstration of an understanding of the context of the project location.
- Demonstration of a project record free of significant technical problems and litigation resulting from errors or omissions.
- Other factors that may be relevant to the project.

11. Final Selection

Proposals will be reviewed by the Building Task Force based upon the criteria noted above. Select firms may be invited to interview with the Building Task Force. Based on qualifications submitted and interviews (if needed), a recommendation will then be presented to the Trustees for approval to negotiate a contract with the preferred team. The Diocese reserves the right to make an award without further discussion of the proposal submitted. The Diocese shall not be bound or in any way obligated until both parties have executed a contract. The Diocese also reserves the right to delay the award of a contract or to not award a contract. Following the Trustees' approval to negotiate with the recommended consulting firm, the Bishop will begin negotiations. In the event negotiations of specific contract terms, conditions and fees prove unsuccessful with this firm, the Trustees may authorize the Bishop to begin negotiations with another qualified firm.

The general conditions and specifications of the RFP and the selected proposal, as amended by agreement between the Diocese and the selected Proposer including e-mail or written correspondence relative to the RFP, may become part of the contract documents. Failure of the awarded Contractor to perform as represented may result in elimination of the Contractor from competition or in contract cancellation or termination.