

Lake Township
Request for Proposal
Zoning Ordinance Review and Amendment Project

Issue Date: May 1, 2024

Due Date: May 31, 2024, 3:00 P.M.

Notice and Instructions to Consultants:

1. **Proposals must be received in the office listed below no later than 3:00 P.M. on May 31, 2024.**
2. **Submit one unbound original proposal, five bound copies and one PDF copy. Include all required information as outlined in Section III, Proposal Format.**
3. **Deliver paper copies of proposals to:
Lake Township, 5153 Scenic Hwy., Honor, MI 49640; and
Deliver the electronic PDF copy to:
laketwpplancom@gmail.com**
4. **Late, faxed and/or unsigned proposals will not be accepted.**

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I. PROJECT OVERVIEW

A. Purpose

Lake Township is inviting qualified planning consultants and multi-disciplinary firms or teams to submit a written proposal in response to this Request for Proposals (RFP) to provide professional services for the purpose of reviewing and amending the Township's Zoning Ordinance.

B. Background

Lake Township is in northwestern Benzie County, Michigan, and according to the most recent census has a population of approximately 700. The Township is internationally renowned as a place of extraordinary natural beauty and excellent environmental quality. The Sleeping Bear Dunes National Lakeshore ("SBDNL") is a dominant feature of the Township, comprising two-thirds of the land area of the Township. Lake Township has been primarily a resort community for the past seventy years, though many retirees are choosing to reside here.

Last year Lake Township revised and updated its Master Plan. Included in the updated plan were the following objectives:

Objective 1 (A): **Zoning Review** –

With input and involvement of the Zoning Administrator, the Planning Commission should conduct a review of the current zoning ordinance and recommend any changes that should be considered by the Township Board. . .

Objective 1 (B): **Watershed Overlay Review and Recommendation-**

The Planning Commission should conduct further assessment of the proposed Crystal Lake Overlay Ordinance amendments, and how the proposal compares to the existing overlay ordinances for Platte and Crystal Lakes and the existing general zoning ordinance... Based on the assessment, the Planning Commission should prepare proposed ordinance changes for approval by the township Board.

This RFP is to assist the Township in completing those objectives.

C. Project Objectives

Assist the Township Planning Commission and Board of Trustees to:

- (1) Determine if changes to the Township's zoning ordinance are appropriate based on the Township's Master Plan and public input received during the development of the Master Plan.
- (2) Determine if changes to the Township's zoning ordinance, with respect to certain identified provisions, would make it more consistent with best practices in other comparable jurisdictions.

- (3) Draft zoning ordinance amendments as deemed appropriate.
- (4) Assist with final adoption of any amendments.

D. Expected Outcome

The expected outcome of this project is an amended and improved zoning ordinance with a corresponding zoning map that is consistent with the Township’s Master Plan. The zoning map will align with the zoning ordinance and will be defined to property boundary accuracy.

II. PROJECT DESCRIPTION

A final scope of work will be developed by the Township and the successful respondent (the “Consultant”), but the scope of work will include the following.

A. Project Orientation

At the outset of the project, the Consultant shall meet with the Planning Commission and the Township Staff for a project orientation meeting to provide an understanding of major project components. These project components include the project goals and schedule, specific issues to be addressed, Township policies, interagency interaction, and the general conditions in the Township. The Consultant shall be responsible for reviewing and understanding the Township’s Master Plan, the public input provided during the Master Plan process, other Township plans and policies, as well as all relevant and applicable local, state, and federal laws.

B. Public Involvement/Project Meetings/Steering Committee

The Consultant shall propose its strategy for public involvement during the project’s anticipated timeframe and budget. It is expected that public involvement will include one open house or other interactive methods. The proposal should include a timeline that identifies key points at which the public will be involved. It is also expected that the Township attorney is kept informed and involved with the rewrite process.

The Consultant in cooperation with the Township Staff shall be responsible for facilitating public meetings during the project, which can include regular Planning Commission meetings. Township staff will be responsible for scheduling meetings. The proposal should include the projected number of meetings, presentations and workshops the Consultant will conduct to achieve a final revised zoning ordinance. Because the objective is to develop a limited number of amendments relating to specific topics or issues, the Township desires the development process to be as efficient as possible.

C. Review of Existing Zoning Ordinance

The Consultant shall complete a review of the Township’s current zoning ordinance and zoning map and its desired improvements. After this review, the Consultant shall identify and discuss the project specific topics listed below and will also identify and discuss any current innovative zoning concepts and approaches, which would update and improve the Township zoning.

Specific topics for review and consideration:

1. Whether the current Resort/Commercial zoning district is needed and appropriate.
2. Assess whether the current zoning allows higher development density or more commercial development than most residents want and would allow undesirable natural and environmental deterioration.
3. Assess the proposed Crystal Lake Overlay Ordinance amendments, and how the proposal compares to the existing overlay ordinances for Platte and Crystal Lakes and the existing general zoning ordinance to help determine if a simplified, uniform ordinance would provide improved compliance and protection for the lakes.
4. Assess current agricultural land use and possible creation of an agricultural zoning district.
5. Assess continuing desirability of the current ban on accessory dwelling units.
6. Consider establishing an average setback allowance for locations with common pre-existing non-conforming setbacks as dictated by topography.
7. Consider clarifications to current provisions for ‘environmentally sensitive areas.
8. Consider adoption of a land division ordinance

D. Annotated Outline

Based on the review of the zoning ordinance analysis and the feedback received from the discussion on innovative zoning approaches, the Consultant shall prepare an annotated outline that includes an overview of the proposed amendments to the zoning ordinance, a discussion of options, and commentary explaining the rationale for the recommended approach to drafting the zoning amendments.

The Consultant shall present the annotated outline to the Planning Commission for review and comments. After obtaining general agreement on the contents of the initial draft of the annotated outline, the Consultant shall provide the Township with a final annotated outline based on the comments received.

E. Discussion Draft Zoning Ordinance

The Consultant shall prepare a discussion draft of the zoning ordinance amendments that is based on the final annotated outline. The discussion draft should be presented in distinct sections that will allow for easy review. The discussion draft will be presented at a Planning Commission meeting. The Consultant shall propose an approach for soliciting input about the discussion draft from the Township Staff including the Board of Trustees, the public, and other stakeholders. Following discussion and review, the Consultant shall provide a revised discussion draft of zoning amendments for further review and action.

F. Discussion Draft Township Wide Ordinance Map

The Consultant shall prepare a “discussion draft” Township wide zoning ordinance map that applies the proposed zoning districts. The Consultant will also help the Zoning Administrator

identify locations that may become a nonconforming use, as to actual use of the property under the proposed zoning ordinance and map. The discussion draft township-wide ordinance map will be presented at a Planning Commission meeting, along with the ordinance amendments identified in Section E, above. Following the Planning Commission meeting, the Consultant will provide a revised discussion draft Township wide ordinance map for further review and action.

G. Public Hearing Draft Zoning Ordinance Amendments and Map

After approval by the Planning Commission, the Consultant shall prepare a public hearing draft zoning amendments and map. In addition, the Consultant shall prepare an executive summary explaining the public hearing draft ordinance amendments and map and any changes from the discussion draft and map including the rationale for such changes. The executive summary will be available for review by the public and the media approximately one month prior to the public hearing.

H. Attend Public Hearings, Revise Zoning Ordinance & Map & Final Adoption

The Consultant shall present the public hearing draft of the proposed zoning ordinance and map at a public hearing of the Planning Commission, explain its contents, respond to questions, and revise the zoning ordinance to incorporate appropriate recommendations. The Consultant will revise the zoning ordinance map to incorporate appropriate recommendations. The Consultant shall then present the zoning ordinance amendments as acted on by the Planning Commission to the Township Council for final adoption.

III. PROPOSAL FORMAT

A. Proposal Organization and Format

To aid in evaluation, it is desired that all proposals follow the same general format. The proposals should have sections with proposal information as outlined in the categories/criteria as detailed in Section C, Required Submittals.

Submit six (6) complete proposal sets (1 unbound original + 5 printed copies) plus one (1) PDF copy. Proposals should be typed and submitted on 8.5"x11" paper. Double sided printing, where appropriate, is preferred.

B. General Submittal Information

The response to the RFP should be succinct but comprehensive and shall include recommended approaches related to the Consultant's ability to achieve the Township's project budget, timeline, objectives, and suggested scope of services.

C. Required Submittals

The proposal shall not exceed 30 pages and include the following presented in the order listed:

Section 1: Letter of Transmittal

A signed letter of transmittal that clearly indicates the single contact (Project Manager), mailing address, telephone number and email address.

Section 2: Table of Contents

Proposals shall include a Table of Contents for all the information and in the exact order at which it occurs throughout the RFP response.

Section 3: Introduction/Summary

Proposals shall include a short introduction and summary of the company, (i.e. how long the company has been in business, the number of employees, etc.). In addition, a description of what disciplines encompassed with the firm shall be included. Information provided shall include the names of key personnel to be assigned to the project, their role on the projects, their titles, experience, and period of service with the team. Include an organizational chart showing the relationship of the Consultant with any subconsultants.

Section 4: Method of Approach

Proposals shall include a description of the Company's Scope of Services, including the extent of public involvement and what, if any tasks will be subcontracted to other consultants. This section shall include:

- a. Methodology addressing the scope of work, including strategy used to achieve the project objectives and scope of services.
- b. Describe the allocation of the project budget by task (time, personnel, ect.).
- c. Describe how the work will be completed in an effective, timely, economical, and professional manner.
- d. Proposals should be all-inclusive detailing your best offer. Additional related services should be incorporated into proposals if applicable.

Section 5: Personnel Qualifications, Expertise & Experience

Project personnel, as applicable, shall be listed including a description of assignments and responsibilities, a resume of project related professional experience and an estimate of the time each would devote to this project, and other pertinent information.

Section 6: Comparable Projects

Identify the last 3 completed comparable projects and any in progress, with the following information:

- a. Reference name with current contact information
- b. Status of the ordinance or amendments (i.e., in progress; adopted)
- c. Nature of public involvement in the formulation of the ordinance or amendments
- d. Size and scale of the geographic area
- e. Nature of the ordinance or amendments

Section 7: Proposed Fee & Timeframe

Proposals shall include a breakdown by Scope of Services element and a lump sum fee for the Services required to fulfill the requirements of the RFP. Proposals should include

D. Proposal Content

The evaluation and selection of a consultant and the contract will be based on the information submitted in the vendor's proposals, plus references and any required interview and/or presentation. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.

E. Evaluation of Proposals

Submitted proposals will be evaluated based on the following criteria:

1. Experience of the Consultant or Consultant Team as indicated by prior successful completion of similar projects, including projects in communities of similar size
2. Relevant experience of key individuals who will be assigned to this project.
3. Quoted cost of services.
4. Understanding of the project and project issues.
5. Proposed project approach and methodology to meet the stated project objectives and an understanding of the proposed scope of services.
6. Demonstrated ability to work effectively with the participation of multiple stakeholders and broad-based public input, and to bring such projects to successful completion within the constraints of time and budget.
7. Demonstrated ability to successfully resolve complex regulatory issues and considerations.
8. Consultant's proposed allocation of the project budget to the respective elements of the scope of services.

F. Consultant Qualifications

Successful consultants should have extensive experience in preparing municipal zoning ordinances and should demonstrate familiarity with innovative zoning concepts and the potential application of these concepts within the Township. The Township may make such investigations as it deems necessary to determine the ability of the consultant to perform the work, and the consultant shall furnish to the Township all such information and data for this purpose as the Township may request. The Township reserves the right to reject any proposal if the evidence submitted by or gathered fails to satisfy the Township that such consultant understands the full scope of work and is properly qualified to carry out the obligations of the contract and to complete the work contemplated.

G. Acceptance/Rejection of Proposals

1. The Township reserves the right to modify this RFP after its issuance and to waive any specific requirements of this RFP, which at the Township's discretion are determined to be in the best interest of the Township. Further, the Township makes no representation that a contract will be awarded to any consultant responding to this request. The Township expressly reserves the right to reject any proposals responding to this invitation

without indicating any reasons for such rejections. The Township reserves the right to negotiate with any consultant it deems suitable to carry out this project.

2. The Township reserves the right to postpone due dates for its own convenience and to withdraw this solicitation at any time without prior notice.

H. Property

All documents, graphics, maps, and exhibits produced by the successful consultant as part of this planning project shall be provided to the Township, become Township property and are available for use by the Township in any manner that the Township deems appropriate.

I. Consultant Interviews/Oral Presentations

Consultants who are deemed most eligible for an interview and oral presentation will be notified of the intended time, date, location, and format as determined by the Township.

J. Incurring Costs

This request for proposals does not commit the Township to award a contract, pay any costs incurred in preparation of these applications or to procure or contract for any services.

K. Timetable

The timetable for this project will span calendar year 2024, and if necessary, the first half of 2025. It is anticipated that the project orientation session will be held in July, 2024 at a mutually convenient time and date. The Lake Township Planning Commission has regular meetings scheduled on: June 20, August 22, and October 24, 2024, beginning at 6:30 P.M. at the Township Hall.

L. Lake Township Master Plan and Zoning Ordinance Copies

A PDF copy of the Township's Master Plan and existing zoning ordinance are available at www.laketwp.org.

M. Conflict of Interest

The Township reserves the right to reject any proposal or consultant if any apparent or potential conflict of interest exists. Consultants and subconsultants shall identify any group, individual or organization that they have worked for or currently work for, if such group, organization or individual has or had ownership, lease, development, related or similar interest in any property or business located Lake Township.