

**Attachment A**

**A RESOLUTION APPROVING A REQUEST FOR PROPOSAL TO CONDUCT  
AN OPERATIONAL REVIEW OF TOWN SERVICES**

**Resolution No. 39/2001-02**

**BE IT RESOLVED BY THE BOARD OF ALDERMEN:**

Section 1. The Board, in approving the proposed RFQ for an operational review of town services, agrees with the subcommittee recommendation to focus the efforts of the review on determining the most effective organizational structure with the end product being a plan or model for maintaining current staffing levels.

Section 2. The Board directs staff to conduct the RFQ process and to bring a recommendation and contract to the full Board.

This resolution shall become effective upon adoption.

The foregoing resolution having been submitted to a vote, received the following vote and was duly adopted this 23rd day of October, 2001.

**ANNOUNCEMENT  
REQUEST FOR QUALIFICATIONS AND LETTERS OF INTEREST FOR STRATEGIC AND  
OPERATIONAL REVIEW OF TOWN SERVICES**

The Town of Carrboro, North Carolina requests submittal of letters of interest and statements of qualifications from qualified firms to perform a comprehensive analysis of the Town's management and organizational structure. The Town is looking for a positive and proactive approach in evaluating the organization and community processes to effectively meet the needs of the community while using the resources at hand.

Analyses may include operational analysis and staffing analysis with recommendations focused on how staff can be most effectively organized with current resources. In addition, it would be helpful to establish a mechanism to make this evaluation an ongoing process.

The primary purposes of the study include the following (but are not limited to):

1. Determine the most effective organizational structure and characteristics currently needed
2. Develop staffing requirements with a model or plan toward maintaining current staffing levels

The study should accomplish or answer the following questions:

1. Will the current organization structure and work processes take the Town into the future?
2. What efficiencies and opportunities for cross-responsibilities are possible?
3. Suggestions for prioritization of Board's efforts
  - a. Define problems facing the Town of Carrboro
  - b. Define where the staffing resources should be concentrated first

Respondents are encouraged to submit information or suggestions on any additional analysis that would be beneficial to the organization and its objectives for the Town to consider.

**BACKGROUND**

The Town of Carrboro is a small local government entity overseen by a Mayor and Board of Aldermen and a Town Manager. The Town is a growing community located next to Chapel Hill, and the University of North Carolina and is near the Research Triangle Park with a population of approximately 16,800 residents.

The total FY01-02 General Fund budget for the Town is \$12,751,013. The town has several other smaller funds primarily for capital reserves or for capital projects.

The Town has 132 employees with 9 departments. The governance style is similar to other jurisdictions in North Carolina with a city manager-council form of government. All departments report to the Town Manager (see attached organization chart).

The major services provided by the Town include police and fire protection; public works (garbage collection, street resurfacing, fleet maintenance, landscaping and building and grounds); planning; inspections and zoning; economic and community development; and parks and recreation programming. The town has administrative support units (personnel, technology, finance, budget, purchasing, town clerk, etc) that provide both direct services as well as indirect support services. Services provided by the town exclude water and sewer services and tax collections.

Certain large costs assumed by the Town reflect key services that are contracted with other governmental jurisdictions such as transit services, recycling, and landfill fees.

The budget for the town is largely supported by property taxes at 53%. The ability of the town to provide services has been aided by steady growth in the tax base. The Town, facing growth in the Northern Transition Area, envisions the potential increase in the town's population to 24,000. In addition, the Town, in an effort to reduce the tax burden on residents, is exploring ways to increase its commercial tax base (15%) as a percentage of its tax base. The second largest tax source is state-shared revenue at 27% of the revenue stream, of which sales tax is the largest source.

The mission of the Town is "to achieve citizen satisfaction by consistently meeting their requirements". This requires the Town to assess the community trends that will have an impact on the Town's ability to meet the community's requirements and needs. The town has conducted numerous needs assessments and developed long-range plans that envision the Town's future and are available for review. These documents include the Town's five-year plan, capital improvements plan, and Vision 2020 plan. Currently the Town is working on a downtown-visioning plan with a goal to increase the tax base.

The result of these efforts is an ongoing struggle to match the Town's resources with the needs and requirements of the community.

#### QUALIFICATIONS.

The firm in responsible charge of this work must have:

- sufficient experience to evaluate the Town's needs, develop plans and cost estimates; and,
- the financial ability to undertake the study and assume the liability.

#### SUBMISSION REQUIREMENTS.

Town of Carrboro will receive written, responses until 2:00 PM DATE TBA 2001. Responses received after this time will not be accepted.

Responses submitted should be concise and address the objectives requested by the Town. Responses shall be limited to a maximum of 15 pages. All respondents to the RFQ shall address the following, as a minimum, and should conform to the numbering system used below:

1. Letter of transmittal, identifying contact person.
2. Explanation of approach to a project of this nature.
3. Company background and history.
4. Listing of similar work performed by your firm over the last 5 years. Include as a minimum: size, scope, cost, location, dates, time adherence, and owner contact.
5. Resume of key team members who will perform the Work.
6. Three (3) client references.
7. Describe any involvement that your firm, its employees, or its owner(s) have that may constitute a conflict of interest.
8. Include hourly rates for personnel to be assigned in whole or in part to the Work.
9. Proposed M/WBE utilization with an explanation of their involvement in the Work.

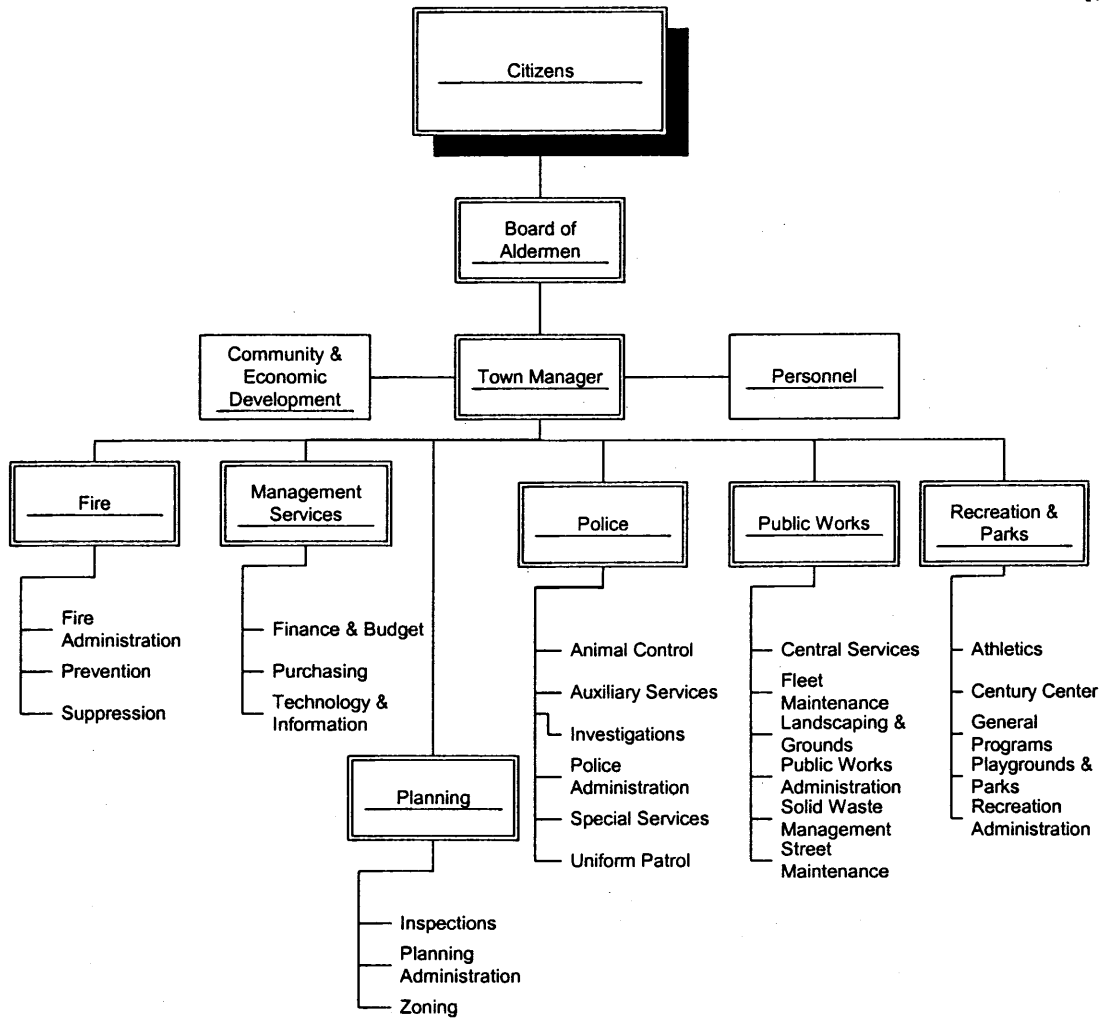
Please submit ten (10) copies of the above requested information to:

Town of Carrboro  
Jan Bryant-Berry, Purchasing Officer  
301 West Main Street  
Carrboro, North Carolina 27510

on or before DATE TBA 2001 at 2:00 PM.

Questions may be addressed to Jan Bryant-Berry at (919) 918-7301.

# Town of Carrboro Organizational Chart



Legal Notice

Request for Qualifications and Letters of Interest for  
Strategic and Operational Review of Town Services

The Town of Carrboro, North Carolina desires to engage a qualified firm for the purpose performing a comprehensive analysis of the Town's management and organizational structure. Analyses may include operational analysis and staffing analysis with recommendations focused on how staff can be most effectively organized with current resources.

Letters of Interest and Statements of Qualifications will be received by the Purchasing Department until DATE TBA 2:00 PM. in accordance with applicable provisions of North Carolina General Statutes and Town of Carrboro ordinances and policies.

The Town reserves the right to reject any or all letters or any portion thereof, or select the letters that in its opinion, are in the best interest of the Town.

Town of Carrboro, NC  
By: Jan Bryant-Berry  
Purchasing Officer

Publication Date:

Run one (1) time:  
News & Observer  
NC League of Municipalities  
Washington Post

**PROPOSED TIMELINE – Operations Review RFQ**

<b>Time Line</b>	<b>Proposed Date</b>	<b>Description</b>
1 week	Sunday, November 3	Place ad in several journals; advertise on Purchasing vendor listservs
30 days following ad	Tuesday, December 11	Bid Opening
1 day	Tuesday, December 11	Distribute responses to Board subcommittee
1 week	Monday, December 18	Meet with Board to identify top 3-4 finalists
1 month	Tuesday, January 2 through Friday, January 25	Schedule interviews with vendors, do reference checks
2 weeks	Tuesday, February 11	Subcommittee presents recommendation and contract to full Board
<b>TOTAL PROCESS: APPROXIMATELY 3 MONTHS</b>		