

# REQUEST FOR PROPOSAL HOTEL MONTEVALLO, ALABAMA

May 9, 2014



## **REQUEST FOR PROPOSAL OUTLINE**

- I. Purpose**
- II. Background**
- III. Project Scope**
- IV. Proposal Objectives**
- V. Proposed Financial Options and Ownership Structure**
- VI. Additional Information**
- VII. Addenda and Supplemental Information**
- VIII. Selection Process**
- IX. MDCD Rights, Options, and Policies**
- X. Submittals**
- XI. Anticipated Evaluation Schedule**
- XII. Right to Reject All Proposals**
- XIII. Non-discrimination Requirement**

### **Exhibits**

- A. City of Montevallo Hotel Feasibility Study, January 2014**
- B. Annotated Aerial Photograph of Downtown Montevallo and the University of Montevallo**
- C. Annotated Aerial Photograph of the Proposed Hotel Site**
- D. Schematic Drawing of the Proposed Hotel on North Boundary Street**
- E. Additional Montevallo Area Activity Centers**
- F. Demographic Profiles of Shelby County, Alabama and the City of Montevallo**

## **I. Purpose**

The Montevallo Development Cooperative District (MDCD) on behalf of the University of Montevallo, Shelby County and the City of Montevallo invites written proposals from qualified developers to provide design-build services including, but not limited to, the financing, design, construction, and operation of a mid-scale to upper midscale hotel with meeting facilities and related amenities in downtown Montevallo, Alabama.

At the conclusion of this RFP process, the MDCD intends to engage a qualified, financially capable firm or project team capable of performing all of the services required to successfully plan, finance, design, develop and manage the project to completion. The MDCD is most interested in proposals that incorporate financial approaches that minimize public participation and risk.

The MDCD desires to proceed with the project in phases. The first component (“Phase 1”) is proposed to expand on the recently completed market feasibility study by Interim Hospitality Consultants (IHC). The completion of the Phase 1 work will provide the detailed information needed by the MDCD to determine whether to advance the project to construction. The Phase 1 components should include:

- The identification and the assembling of the proposed development and finance team
- The identification and selection of the proposed hotel flag and operator
- The negotiation of the terms with a hotel operator (term sheet)
- The development of the conceptual site plans and conceptual design package
- The identification of and the negotiated terms for any equity partners (term sheet)
- The development and finalization of the proposed capital and financial plans
- The proposed costs of any services to the MDCD shall also be included in the proposer’s response to the RFP

The second component (“Phase 2”) would consist of all remaining necessary pre-development work through construction and opening (should the MDCD authorize the developer to proceed with the project), including, but not necessarily be limited to:

- The preparation and schematic and construction drawings, and submittal to the applicable project development review staff to check all plans and secure required permits and approvals
- Negotiation of necessary agreements with sub-consultants and the proposed hotel operator
- Approve and close all necessary financing
- Construction of facilities to include the hotel and all appurtenances including striping and landscaping treatment
- Pre-opening and grand opening activities

The firm or project team selected to perform Phase 1 would perform both phases of work should the MDCD elect to proceed with Phase 2. Proposals should be structured accordingly.

## **II. Background**

In late 2013 the MDCD engaged the firm, Interim Hospitality Consultants (IHC), to conduct a new market feasibility study for the City of Montevallo to determine if economic conditions had improved enough in the national and local economies to support a hotel with meeting rooms. A previous market feasibility conducted prior to onset of the Great Recession had indicated the City could support a hotel. Another study conducted in late 2010 during the middle of the recession indicated that the City needed to wait until market conditions in the hospitality industry improved before advancing the project. The recently completed feasibility study revealed that the City of Montevallo could successfully support a market-driven, midscale, limited-service transient hotel in Montevallo, Alabama.

### **The City of Montevallo**

The City of Montevallo is located in Shelby County, Alabama about 30 miles south of downtown Birmingham. The City is home to the University of Montevallo, a public liberal arts university with a fall 2013 enrollment of 3,066 students, including approximately 900 students who live on campus. The City of Montevallo had an estimated population of 6,452 in 2012 according to the U.S. Census Bureau.

In part because the University is located in the heart of downtown, Montevallo offers a surprising variety of cultural and athletic events. The City is in every sense a quintessential college town. Main Street Montevallo is an attractive and appealing destination that is inviting to residents, students, employees and visitors alike.

## **Demographics**

### **Shelby County**

Shelby County has been one of the 100 fastest growing counties in the U.S. in each of the last four decades. According to the 2010 Census, Shelby County also maintained its position as the fastest growing county in the State of Alabama for the fourth consecutive decade. Between 2000 and 2010, Shelby County's population increased by 51,792 residents to 195,085 – an increase of 36.1 percent. Shelby County's population has nearly doubled over the past two decades and nearly tripled over the past three decades. In 2013 the U.S. Census Bureau estimated Shelby County's population at 204,180.

### **City of Montevallo**

Between 2000 and 2010, the City of Montevallo's population increased from 4,825 to 6,323 – an increase of 31.0 percent. According to the most recent projections developed by the Birmingham Regional Planning Commission of Greater Birmingham, the greater Montevallo area is expected to continue to grow moderately over the next two decades as residential subdivision development continues to be built along the S.R. 119 and S.R. 25 corridors. The growth rate for the Montevallo area is also expected to increase after the proposed Calera Bypass is completed. Once completed this multilane highway bypass will terminate on S.R. 25 four miles east of downtown Montevallo. The University of Montevallo's strategic plan calls for the University to increase student enrollment by 500 additional students over the next few years.

Detailed demographic information for the City of Montevallo and Shelby County and how it compares with U.S. and Alabama totals is included in Exhibit F.

### **Downtown Montevallo**

In large part because of the proximity of the University of Montevallo to downtown, the City of Montevallo has maintained much of its historic downtown core. The City of Montevallo is the most walkable community in the greater Birmingham region. The character and attractiveness of the downtown is also being enhanced by several new infrastructure projects that are improving the walkability and aesthetic character of Main Street and North Boundary Street.

In recent years the City of Montevallo, the University of Montevallo and Shelby County have worked together to plan and implement a variety of major capital improvement projects to revitalize and enhance the campus and downtown Montevallo, making the City an even more attractive place to live, work and play. These new projects support the City's ongoing efforts to advance walkability, livability and sustainability through good community design while supporting growth and development that complements and enhances the existing community's assets.

A major capital improvement project that has and will continue to add to the desirability of the area around the proposed hotel site is the recently completed North Boundary Street Promenade project. This has created a desirable pedestrian-focused and friendly corridor connecting the University of Montevallo to Orr Park. The Main Street Montevallo project, a broad scope downtown renovation, will intersect the Promenade project on Main Street (S.R. 119). Both of these streetscape projects are expected to serve as catalysts for significant additional investment in downtown. The recently completed rehabilitation of a downtown building on Main Street and North Boundary Street to house the University Bookstore operated by Barnes and Noble and the conversion of the former Alabama Power Company Building on Main Street to house the University of Montevallo's Department of Behavioral and Social Sciences have already resulted in a significant increase in pedestrian activity and retail and restaurant business on Main Street.

### **The University of Montevallo**

The University of Montevallo is a public liberal arts university with a fall 2013 enrollment of 3,066 students. Students come from nearly every county in Alabama, surrounding states and 23 foreign countries. The campus is located adjacent to downtown Montevallo, approximately 30 miles south of Birmingham. The picturesque campus was designed by the Olmstead Brothers and the central campus is designated as a National Historic District. Montevallo is ranked in the 2014 edition of “America’s Best Colleges” by *U.S. News & World Report* as the number one public master’s level university in Alabama and the 15th best public university in the South. With 135 full-time and 75 part-time faculty members and more than 450 full-time employees, the University is also one of the 10 largest employers in Shelby County.

The University of Montevallo is a member of the Peach Belt Athletic Conference. The University fields 12 NCAA Division II athletic teams that compete in the conference. Sports include men’s and women’s basketball; men’s and women’s soccer; men’s and women’s golf; men’s and women’s cross-country; women’s tennis, volleyball, and track & field; and baseball. The University is developing facilities to add women’s softball and indoor track & field and men’s outdoor track & field beginning in 2014-2015.

### **The American Village**

The American Village Citizenship Trust is located on S.R. 119 four miles northeast of downtown Montevallo. It was created by legislative act in 1995 and dedicated in November 1999. The American Village is the first civic education campus in the country built to provide experience-based learning about American history for students. The 185-acre American Village campus is open year round and serves more than 75,000 visitors per year. Visitors include school groups from throughout the southeast and a variety of major private events, including more than 100 weddings per year. The chapel at American Village can accommodate groups with up to 250 guests. In February 2014 The American Village held a dedication ceremony for the newly constructed National Veterans Shrine that was patterned after Carpenters Hall in Philadelphia. The new Matthews Center is also nearly completed. The Center will include a large conference center in “The Rotunda.”

### **Alabama National Cemetery**

The 479-acre Alabama National Cemetery is located 3.5 miles northeast of downtown Montevallo on S.R. 119 adjacent to American Village. The cemetery provides thousands of Alabama veterans a place to be buried with honor and dignity. The cemetery is designed to eventually serve up to 200,000 veterans over the next 50 years.

The veteran’s cemetery was dedicated in July 2008. The first phase will eventually house 7,395 full-casket gravesites, 999 in-ground cremation sites and a 2,700-unit columbarium. The

cemetery is expected to handle approximately 1,100 burials per year. The Cemetery hosts an annual Memorial ceremony which includes dignitaries from all over the state and the country.

### **Regional Transportation**

Interstate 65 is located seven miles east of downtown Montevallo. The City is connected to the interstate highway system by two state highways – Alabama S.R. 119 and S.R. 25. Shelby County is located in close proximity to the center of the State’s transportation network with superb access to I-65, I-20, I-59, I-459, I-22, U.S. 280, U.S. 31, and U.S. 231 in addition to numerous state routes.

### **Site Description**

The proposed hotel site is located in the heart of downtown Montevallo on the east side of North Boundary Street between Main Street (S.R. 119) and the University of Montevallo. The hotel site also fronts the recently completed Promenade streetscape improvement project. The 1.6-acre site is located on the south edge of the University of Montevallo campus. It is located between one and two blocks north of Main Street (S.R. 119) on one of the major gateways into the University campus. Jeter Hall currently occupies the site and the University building can be preserved or razed to accommodate the new hotel.

In addition to its prime location on the Montevallo Promenade and access to the University of Montevallo and downtown, the site is also centrally located between the City’s two Historic Districts. Because of the location of the hotel within the historic University of Montevallo campus, the architectural character of the hotel should incorporate design elements that reflect the architectural character of the surrounding University of Montevallo buildings and downtown Montevallo, particularly with respect to the brick façade.

### **Design Criteria**

The proposed hotel will incorporate the appropriate recognition of Jeter Hall and its historical significance within the structure. This can be accomplished through inclusion of materials and memorabilia from Jeter Hall in meeting rooms, lobby areas, or other concepts proposed by the developer. Program space such as a main floor office with common area access should be included for use by the University of Montevallo for the purpose of an initial point for prospective students. The space will increase traffic flow through the hotel and encourage overnight stay by visiting prospective students and their families.

Design standards have been established to preserve, protect, enhance and maintain the aesthetic, cultural, historic architectural and other significant elements of the historic downtown area and the University of Montevallo. These standards are intended to promote the development and redevelopment of the downtown area in a manner that is consistent and compatible with the unique and diverse elements of historic downtown and the University. The standards address the architectural character of buildings through detailing and their relationship to the street with

emphasis on the streetscape and the downtown experience. Building design standards are established to promote architectural diversity while encouraging design that relates to and reinforces the overall character of their immediate surroundings. A strong building-to-pedestrian relationship may be accomplished through the use of building details that relate to the human-scale. Building design standards will be applied as follows:

- Architectural style of new buildings should offer high quality and compatible interpretations of the traditional styles that are found within the downtown area and the University.
- The primary materials for buildings in the Urban Core District shall be brick.
- Ornamental detailing such as window casements, cornices, decorative grills and columns may be made of wood, metal, natural stone or other traditional materials.
- The color palette for the Urban Core should consist of muted and subtle colors. The predominant colors should include natural brick and stone colors of red, buff, cream and gray. Accent and trim colors that are darker or lighter may be acceptable.
- Brick, stone, tile and glass surfaces should not be painted unless paint already exists on these surfaces.
- Lighting to accent the architectural style of buildings and promote the safe and positive night time environment of the Urban Core District is encouraged.
- Façade lighting shall be oriented to minimize glare on streets, sidewalks or adjacent properties.
- All mechanical or utility equipment shall be screened or fully integrated into the overall design through the use of like or complementary materials, color, and scale.

In addition to the design standards, landscape standards have been established by the city of Montevillo. Landscape design that meets the intent of said standards will be required. Site Plan approval from the City of Montevillo Planning Commission will be required.

### **Parking**

The redevelopment of the site to accommodate a new hotel that will provide 1 parking space per room and 1 parking space per employee is required in accordance with the City of Montevillo Zoning Ordinance. A conceptual layout for the proposed hotel with approximately 70 rooms including approximately 104 parking spaces is included in Exhibit D.



### **III. Project Scope**

We are asking proposers to outline a partnership with the Montevallo Development Cooperative District (MDCD) and its partners -- the City of Montevallo, the University of Montevallo and Shelby County, and to finance, design, construct and operate a new mid-scale or upper mid-scale franchised hotel with approximately 70 rooms. The hotel will also include meeting rooms with the capacity to accommodate business meetings or conferences. The new hotel will be located on property owned by the University of Montevallo. The hotel operator will be provided a long-term lease from the MDCD for the property.

Through this RFP the MDCD is soliciting proposals from qualified firms capable of performing all services needed to guarantee the development and operation of the project with the least amount of participation possible from the MDCD and its respective staffs. The MDCD desires to approach the project in incremental phases. The first component ("Phase 1") should expand on the market feasibility study completed by Interim Hospitality Consultants (IHC) and should include:

- The identification and the assembling of the proposed development and finance team
- The identification and selection of the proposed hotel flag and operator
- The negotiation of the terms with a hotel operator (term sheet)
- The development of the conceptual site plans and conceptual design package
- The identification of any equity partners and the negotiated terms with the partner
- The development and finalization of the proposed capital and financial plans

The cost of said services is undetermined but would be included in the proposer's response to the RFP.

The second component ("Phase 2") would consist of all necessary remaining pre-development work through construction and opening (should the MDCD authorize the developer to proceed with the project), including, but not necessarily be limited to:

- The preparation and schematic and construction drawings, and submittal to the City of Montevallo's project development review staff to check all plans.
- Negotiation of necessary agreements with sub-consultants and the proposed hotel operator
- Approve and close all necessary financing
- Construction of facilities to include the hotel and all appurtenances including striping and landscaping treatment.
- Pre-opening and grand opening activities

The RFP should include the Proposer's intent to complete Phase 1 and for the MDCD to fully understand its ultimate financial commitment, if any, to be approved and advancing the proposed project to Phase 2. Following the completion of Phase 1, the MDCD will reserve the right to proceed or not to proceed to Phase 2 and the construction of the project. The execution of a design-build contract will not commit the MDCD or any of its entities to actually proceed with construction. It instead creates a process by which the MDCD can transition from the design to the construction phase if it is determined by the MDCD to be in the MDCD's best interest to advance the project to construction.

### **Project Scale**

The market feasibility study recommended the construction of an upper mid-scale hotel with an appropriate major national lodging brand with approximately 70 rooms. The MDCD desires the related amenities to reflect the features included in the market study and include sufficient multipurpose space for meeting rooms sufficient to support small business meetings or conferences.

### **Fiscal Impact**

The fiscal impact to the MDCD of proceeding with each phase of the project will not be known until specific proposals are received from qualified firms. Based on the detailed description of the work to be performed in each phase of the project, including conceptual architectural and site design, detailed financial analysis, and negotiations; the professional fees and other costs, including contingencies will be specifically documented in each proposal for the MDCD's Selection Team to assess. No financial commitment will be required unless and until a contract is executed.

## **IV. Proposal Objectives**

At the conclusion of this RFP process, the MDCD intends to engage a Firm or Project Team capable of performing all of the services required to insure the construction and operation of the proposed project. The MDCD is most interested in proposals that include methods of structured financing to minimize public participation. The project scope should include all remaining pre-development work through completion of construction for the proposed project. The financial plan should also clearly document the ultimate financial commitments of both the private and public sector partners, and the project plan should specify the services to be performed by each participating entity during each phase of work along with all anticipated fees.

## **V. Proposed Financial Options and Ownership Structure**

It is the MDCD's goal to minimize the level of public financial participation in the project while achieving a distinctive, high quality and successful project. Proposers are encouraged to consider creative development and financing structures that will accomplish these goals.

Proposers should develop and provide a detailed financial plan that includes the structure and type of debt and equity. The proposal should detail the type and level of the MDCD's exposure to financial risk and the Board's and other participant's returns in consideration for their participation. The MDCD Board's participation in the project could include public infrastructural improvements, and/or cash or financing vehicles.

The proposed site for the hotel is located on the campus of University of Montevallo and the University will maintain ownership of the property. The property will be leased through the MDCD for the purpose of constructing and maintaining a hotel on the site. It is anticipated the economic impact of the lease will allow the hotel to be constructed and subsequently leased. It is anticipated that the project will be implemented in multiple steps, beginning with the development and approval of a financial plan before advancing the project to the design phase. The execution of a design-build contract will not commit the MDCD to actually proceed with construction of the project. Rather this approach would allow the MDCD and the developer to proceed from design to the construction phase if and when the MDCD determines it to be in the MDCD's best interest.

### **Financial Objective**

While the MDCD Board will have the ultimate responsibility to decide on the amount and type, if any, of public financial participation; it is most interested in proposals that include methods of structured financing that minimizes the level of public participation. Proposals that exclude or minimize public financial commitment will be favorably considered.

The MDCD Board is open to and will consider various ownership structures, including the following alternatives:

**Private Equity Investor** – The Investor/Developer owns the hotel facilities and secures a long-term land lease from the MDCD for the hotel site. The investor would be responsible for guarantees on private debt, secured by the hotel revenues.

**Private-Public Partnership (Developer/MDCD)** - In exchange for its financial participation, the public entity (MDCD) and its individual partners will review incentive options that could include joint ownership or public development and ownership. Financing and property improvement expenditures will be obtained and serviced by the Developer. Public financial

participation, if needed, could come from a combination of future City of Montevallo lodging tax revenues generated from the project, long-term parking and property leases, potential site preparation limited to razing of the existing building, and other unspecified financial sources as determined by the MDCD. Proposals that exclude or minimize public financial commitment will be favorably considered.

## **VI. Additional Information**

### **Hospitality Market Competition in the Greater Montevallo Region**

#### **City of Montevallo does not have any flagged hotels located anywhere in the City.**

Currently, the closest hotel facilities to Montevallo are located approximately 7 miles from the City along the Interstate 65/U.S. 31 corridor. It is anticipated that the proposed hotel in Montevallo will function primarily as a destination hotel in contrast to the existing facilities in the general vicinity of greater Montevallo.

The Montevallo area has a number of activity centers and attractions that generate trips and overnight visitors to the City that will help support the proposed destination hotel/conference center. As noted above these attractions include the academic and athletic programs at the University of Montevallo, The American Village, the Alabama National Cemetery, and downtown Montevallo. A variety of other attractions is located in the Montevallo area, including bass fishing on Lay Lake, canoeing and tubing on the Cahaba River, experiencing Alabama's most popular wine trail and hiking and bird watching on local trails, including the Ebenezer Swamp Research Center Environmental Educational Boardwalk. Other visitors to the region include bikers, hikers, and others who enjoy exploring the City's two historic districts or discovering their creative side at local art galleries or one of the four annual art festivals. Others come and stay in the area overnight to participate in local anniversary and wedding events and family reunions. These other area attractions are identified below in Exhibit E.

All of the existing alternative hotel options for Montevallo listed below are based primarily on a freeway driven market and do not function as destination hotels.

## **HOTELS LOCATED IN THE VICINITY OF DOWNTOWN MONTEVALLO**

<b><u>Hotel Chain</u></b>	<b><u>Year Built/ Renovated</u></b>	<b><u>Distance From DT</u></b>	<b><u>Floors</u></b>	<b><u>Rooms</u></b>	<b><u>Chain Scale</u></b>
Hampton Inn - Calera	2007	6.8 miles	4	91	Midscale
Quality Inn - Calera	1998	7.3miles	2	65	Midscale
Americas Best Value Inn - Calera	1997	7.9 miles	1	32	Economy
Days Inn - Calera	1970	7.9 miles	1	44	Economy
Candlewood Suites - Alabaster	2008	8.8 miles	4	88	Midscale
Quality Inn - Pelham	1991	12.7 miles	2	62	Midscale
Fairfield Inn & Suites by Marriott - Pelham	2010	16.1 miles	4	93	Midscale
Hampton Inn and Suites - Pelham	2002	16.2 miles	3	85	Midscale
Comfort Inn & Suites - Pelham	2010	16.2 miles	4	75	Midscale
Best Western Plus Oak Mtn. Inn - Pelham	1996/2004	16.2 miles	3	60	Upper-Midscale
Travelodge - Pelham	1989/2001	16.3 miles	2	64	Economy
Sleep Inn - Pelham	1996	16.3 miles	3	80	Midscale
Ramada Limited Motel – Pelham	1993	16.4 miles	2	64	Midscale

### **Addenda and Supplemental Information**

Any and all addenda to this RFP will be provided to all potential proposers who received the initial RFP and provided contact information to the MDCCD in the event it becomes necessary for the MDCCD to make revisions, request or provided additional information, or respond to written inquiries related to the RFP. It is the responsibility of potential proposers to provide timely contact information to facilitate the receipt of addenda and supplemental information requests, if issued. Requests for additional information or questions should be submitted in writing to Chad Scroggins, Shelby County Development Services at [cscroggins@shelbyal.com](mailto:cscroggins@shelbyal.com).

It may be necessary for the MDCCD to request supplemental information from individual proposers after the proposals have been submitted and reviewed by the Selection Committee. Such information will be requested in writing to a specific proposer. This additional information will become part of the original proposal submitted by the specific proposal and will be used by the Selection Committee to evaluate the proposal. Any proprietary information received will not be shared with other proposers during the evaluation, negotiation, or award process.

## **VII. Selection Process**

A Selection Committee appointed by the MDCD and its partners -- the City of Montevallo, the University of Montevallo and Shelby County -- will evaluate each proposal. If necessary, at the Selection Committee's discretion, the highest ranked Firms or Project Teams may be invited to make oral presentations.

**Review of Proposals** – The Selection Committee will review responses to the RFP. Selections will be based on the completeness of proposals and on the responses that demonstrate the best combination of experience, expertise, understanding of the project objectives, and approach.

**Evaluation Criteria** – The Selection Committee will evaluate the proposals on the basis of the response to the requirements of this RFP. Proposals will be evaluated based on responses to the following criteria:

- a. Team Structure – The proposal demonstrates the Firm or Project Team's ability to provide a team that has the capacity to successfully implement the project.
- b. Experience – The proposal clearly demonstrates that the Firm or Project Team has the relevant experience and expertise to provide the range of services identified in the RFP to successfully develop and execute the project. These services should include at a minimum: financing, design, construction, and operation. Submitted materials should demonstrate that the Firm or Project Team has the ability and experience to deliver projects that meet the objectives of the RFP in a timely and cost efficient manner.
- c. Project Understanding – The proposal should demonstrate that the Firm or Project Team understands the project scope and the intent and goals of the RFP.
- d. Proposed Approach – The approach should describe and detail a collaborative approach that meets the expectations of the MDCD, including the plan development, financial plan, construction, project management and administration, and schedule.
- e. Proposed Public and Private Financial Commitments – Proposals that emphasize private investment and minimize public investment and risk are desired and will be favorably received.
- f. References – References will be contacted for the top qualifying Firms or Project Teams.

**Oral Presentations** - Firms or Project Teams may be invited to provide a presentation to the Selection Committee and participate in a discussion of the respondent's submission. The purpose of this would be to provide respondents an opportunity to elaborate their qualifications and ensure mutual understanding of the project.

## **VIII. MDCD Rights, Options, and Policies**

The MDCD reserves the right to make a decision after reviewing the written proposals with or without oral interviews.

The MDCD reserves the right to modify any portion of, postpone, or cancel this RFP at any time; and reject any and all submissions. The MDCD will protect and return confidential or proprietary information to proposers who are not selected upon request. If it becomes necessary to revise any part of this RFP, all firms who received the RFP will be notified and will receive addenda. Respondents must acknowledge all addenda. Questions and requests for clarifications regarding this RFP must be submitted in writing no later than twenty (20) days prior to submission deadline.

The MDCD encourages the participation of locally qualified firms and contractors to participate in all aspects of submitted proposals.

The MDCD encourages the participation of small, minority, women-owned, or other disadvantaged business enterprises in all aspects of this project.

## **IX. Submittals**

Three signed copies and one electronic copy (CD or memory stick) of the proposal must be submitted in a sealed envelope. Proposals must be complete to be considered. The MDCD is not liable for any costs incurred by respondents. The contents of the response of the selected firm (s) will become contractual obligations should a contract be entered into as a result of the RFP.

Proposals must be submitted to:

ATTN: Chad Scroggins, Manager of Development Services  
Shelby County Department of Development Services  
Montevallo Hotel Project  
1123 County Services Drive  
Pelham, AL 25124-6128

## **X. Evaluation Schedule**

The anticipated evaluation schedule for this RFP is as follows:

<b><u>TASK</u></b>	<b><u>DATE</u></b>
Release RFP	May 9, 2014
Site Visits	By Appointment beginning May 19, 2014
Deadline to Request Clarifications to RFP (Requests must be submitted in writing)	July 18, 2014
Deadline to Submit Written Proposals	August 7, 2014 (4:30 p.m. CDT)

Proposals must be received no later than 4:30 p.m. CDT on August 7, 2014. The proposals will be date and time stamped upon receipt. The MDCCD will not consider proposals received after this deadline. All inquiries and requests for clarification must be submitted in writing and a written response will be provided in return. If you have any questions, please email Chad Scroggins at [cscroggins@shelbyal.com](mailto:cscroggins@shelbyal.com).

## **XI. Right to Reject All Proposals**

The MDCCD reserves the right to reject any and all proposals and waive minor irregularities in any proposal. The proposers must bear the costs of preparing and submitting their proposals. The MDCCD will not reimburse for those incurred costs.

## **XII. Non-discrimination Requirement**

By submitting a proposal, the proposer and its subsidiaries are asserting that they do not and will not discriminate against any employee or applicant for employment on the basis of race, religion, sex, color, national origin, sexual orientation, ancestry, marital status, physical condition, pregnancy, political affiliation or opinion, age, or medical condition.

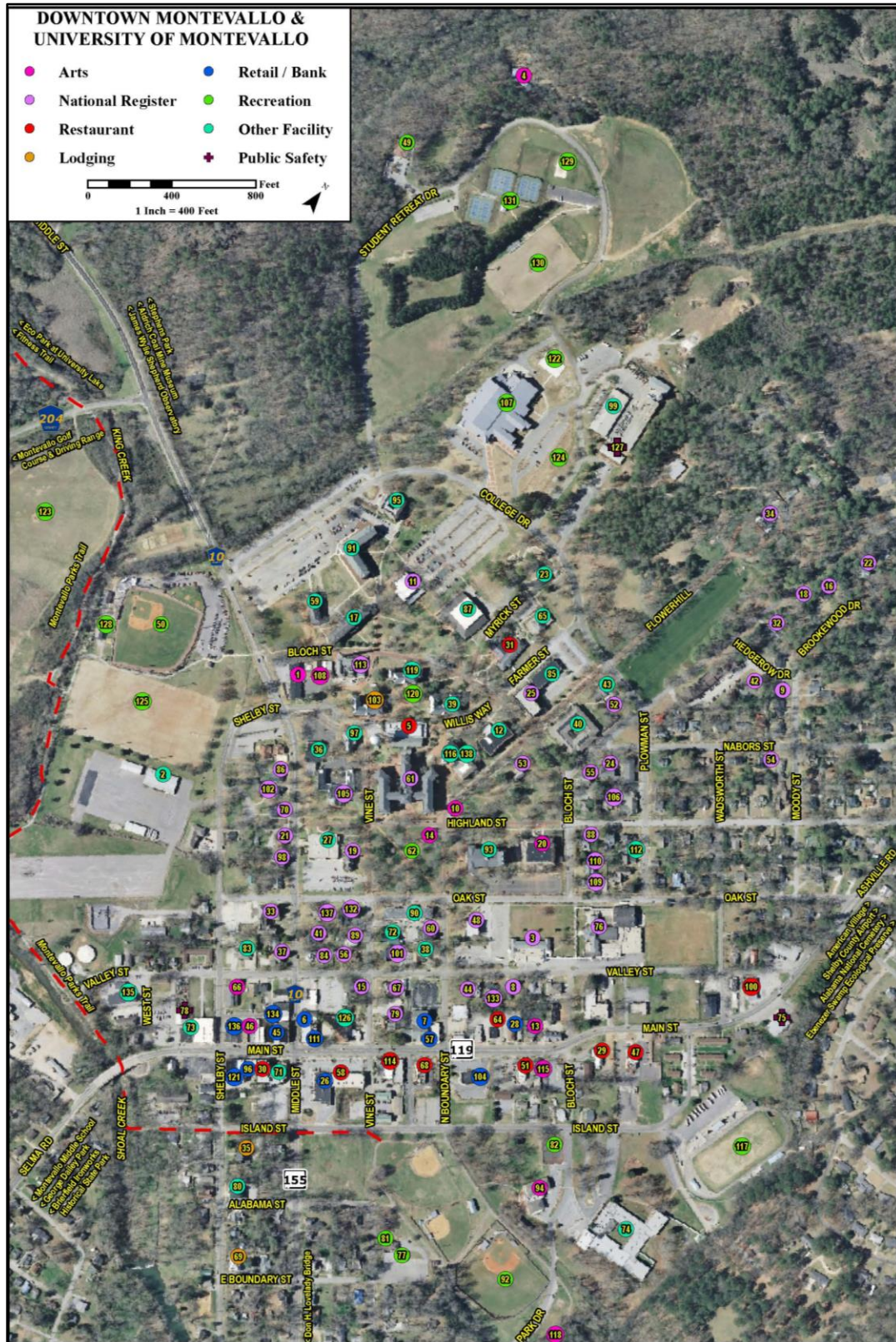


## **EXHIBIT A**

**City of Montevallo Hotel Feasibility Study, January 2014**

**[Provided separately on USB flash drive]**

## EXHIBIT B -Annotated Aerial Photograph of Downtown Montevallo and the University of Montevallo





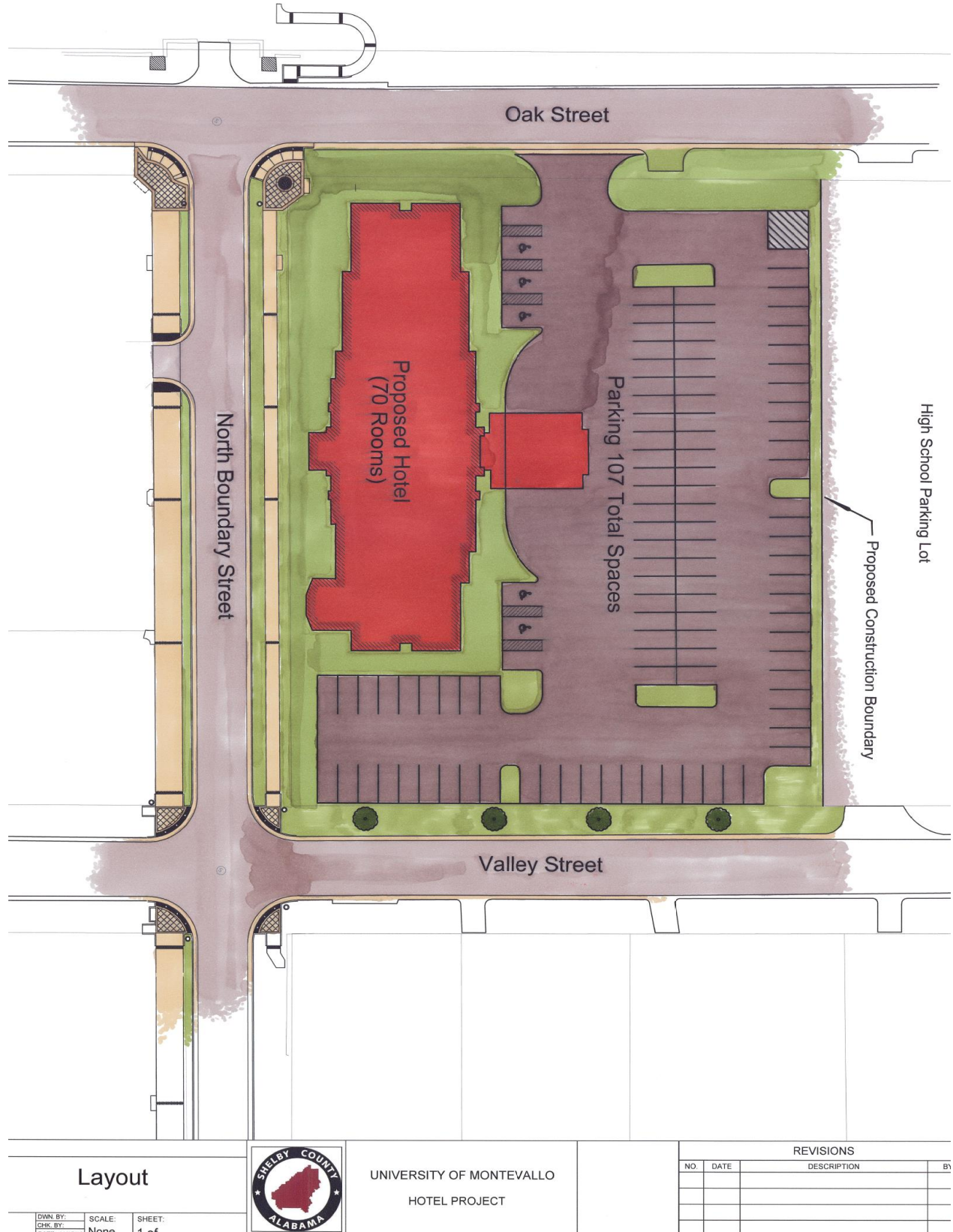
POINTS OF INTEREST			
UNIVERSITY OF MONTEVALLO CAMPUS			
3-D Building	1	Meroney House	70
Alabama Traffic Education Center	2	Morgan Hall	85
Alice Boyd Building	3	Mulkey-Sims House	86
Anagama Kiln	4	Myrick Hall	87
Anna Irvin Dining Hall	5	Napier Hall	90
Becoming Sculpture	10	New Residence Hall	91
Bibb Graves Hall	11	Palmer Hall (Admissions Office)	93
Bloch Hall	12	Peck Hall	95
Bowers Colonnade and Centennial Plaza	14	Peterson Hall	97
Brooke Hall	17	Peterson House	98
Calkins Hall	19	Physical Plant	99
Carmichael Library	20	Purvey House	102
Cary-Calkins House	21	Ramsay Hall (Conference Center & Lodge)	103
Child Study Center	23	Reynolds Hall	105
Comer Hall	25	Robert M. McChesney Student Activity Center / Bank Trust Arena	107
Davis Hall	27	Scene Shop	108
Farmer Hall (James R. Wilkinson Student Life Center)	31	Sharpe House (Alpha Tau Omega Fraternity)	110
Flowerhill	34	Steam Plant / Laundry Building	113
George C. Wallace Speech and Hearing Center	36	The Tower	116
Global and Community Outreach	38	Tutwiler Hall	119
Hanson Hall	39	Tutwiler Quad	120
Harman Hall	40	UM Basketball Courts	122
Hill House	43	UM Cross Country Course	123
Jeter Hall	48	UM Disc Golf Course	124
John W. Stewart Student Retreat Center	49	UM Intramural Fields	125
Kermil A. Johnson Field	50	UM on Main	126
King Cemetery	52	UM Police Station	127
King House	53	UM Public Restrooms	128
Lovelady Building (Bookstore)	57	UM Sand Volleyball Court	129
Lund Hall	59	UM Varsity Field	130
Lyman-Saylor House	60	UM Varsity Tennis Courts	131
Main Hall	61	Van Tuyl House	132
Main Quad	62	Will Lyman House (Welcome Center)	137
Mass Communication Building	65	Wills Hall	138
NATIONAL REGISTER PROPERTIES			
Alice Boyd Building (1939)	3	Lewis-Wacker/Feger House (1920)	56
Barnes House (1935)	8	Lyman-Saylor House (1858)	60
Beck Apartment Building (1928)	9	Main Hall (1897-1908)	61
Bibb Graves Hall (1935)	11	McCounghy-Warnke-Kirby House (1880's)	67
Brandy-Vance House (1920)	15	McKibbin House B&B (1900)	69
Brooke Servant House (1929)	18	Meroney House (1886)	70
Brook-Zeannah House (1929)	16	Montevallo High School (1929-1930)	76
Calkins Hall (1917)	19	Montevallo Post Office	79
Cary-Calkins House (1850)	21	Morgan-Winslett House (1896)	84
Chamberlain-Kelly House (1926)	22	Mulkey-Sims House (1880)	86
College View Apartments (1928)	24	Nabors-Wills-Sears House (1910)	88
Comer Hall (1939)	25	Napier-Legg House (1929)	89
Farrar-Stockton-Jones House (1940)	32	Peterson House (1900)	98
First United Methodist Church (1907)	33	Presbyterian Student Center (1880's)	101
Flowerhill (1928)	34	Purvey House (1896)	102
Givhan-Lein House (1880)	37	Reynolds Hall (1851)	105
Hattie Lyman House (1930s)	41	Riddle-Flatt House (1850)	106
Hedgerow Apartments (1935)	42	Sharpe Apartments (1938)	109
Horn-Chism House (1880s)	44	Sharpe House (1936)	110
Jeter Hall (1915)	48	Steam Plant / Laundry Building (1908)	113
King Cemetery (1848)	52	Van Tuyl House (1850)	132
King House (1823)	53	Vest-Chism House (1880)	133
Lawson House (1934)	54	Will Lyman House (1886)	137
Leeper-Garrett House (1928)	55		
ARTS			
3-D Building	1	International Art Gallery	46
Anagama Kiln	4	Masterson Stained Glass Studio	66
Becoming Sculpture	10	Parnell Memorial Library	94
Blue Phrog Gallery	13	Scene Shop	108
Bowers Colonnade and Centennial Plaza	14	Sweet Ink	115
Carmichael Library	20	Tinglewood	118
RESTAURANT			
Anna Irvin Dining Hall	5	Lula B's	58
Eclipse	29	Main St. Tavern	63
El Agave	30	Mamas Kitchen	64
Farmer Hall (World of Wings Cafe)	31	McDonald's	68
Jack's	47	Pizza Hut	100
KFC	51	Subway	114
LODGING / RETAIL / BANK			
Arce's Attic	6	Personally Yours & Mine	96
Bank Trust	7	Ramsay Hall (Conference Center & Lodge)	103
CVS Pharmacy	26	Regions Bank	104
Doodles	28	Smitherman's Pharmacy	111
Fox and Pheasant Bed & Breakfast	35	Type Shop	121
House of Serendipity	45	Video Underground	134
Lovelady Building (Bookstore)	57	Wear It Again	136
McKibbin House Bed & Breakfast	69		
RECREATION			
John W. Stewart Student Retreat Center	49	Tutwiler Quad	120
Kermil A. Johnson Field	50	UM Basketball Courts	122
Main Quad	62	UM Cross Country Course	123
Montevallo Parks & Recreation Building	77	UM Disc Golf Course	124
Montevallo Senior Center	81	UM Intramural Fields	125
Montevallo Tennis Courts	82	UM Public Restrooms	128
Orr Park	92	UM Sand Volleyball Court	129
Robert M. McChesney Student Activity Center / Bank Trust Arena	107	UM Varsity Field	130
Theron Fisher Stadium	117	UM Varsity Tennis Courts	131
PUBLIC SAFETY / OTHER FACILITY			
Montevallo Baptist Church	71	Montevallo Presbyterian Church	80
Montevallo Church of Christ	72	Montevallo Water & Sewer	83
Montevallo City Hall	73	St. Andrews Episcopal Church	112
Montevallo Elementary School	74	UM Police Station	127
Montevallo Fire Department Station #1	75	Ward Chapel African Methodist Episcopal Church	135
Montevallo Police Department	78	Will Lyman House (Montevallo Chamber of Commerce)	137

## EXHIBIT C- Aerial Photograph of Proposed Hotel Site





## EXHIBIT D- Schematic Drawing of the Proposed Hotel on North Boundary St.



## **EXHIBIT E**

### **Additional Montevallo Area Activity Centers**

The new hotel will be supported by four major local generators -- the University of Montevallo, The American Village, the Alabama National Cemetery and downtown Montevallo. In addition to these major local attractions, Montevallo and the areas surrounding the city have a number of other destinations that attract visitors to the area and will serve as catalysts that generate additional overnight stays including

#### **Orr Park**

A beautiful park situated along Shoal Creek in downtown Montevallo known throughout the southeast for the numerous intricately carved cedar trees by Tim Tingle.

#### **The Montevallo Parks Trail**

A recently completed nearly two mile long trail connects downtown Montevallo and the University with Stevens Park and Orr Park.

#### **The Downtown Montevallo and the University of Montevallo Historic Districts**

The proposed hotel site is centrally located near the intersection of these two large historic districts.

#### **Thriving Local Arts and Community Events**

The emerging local arts community includes several galleries located in historic downtown Montevallo. The Annual Montevallo Art Show takes place in mid-April and the Montevallo Literacy Festival is an annual campus event. Three annual downtown art walks are co-sponsored by the University and the city. The Tour De Cure, Olympics Day and Run for Researching attract visitors to downtown. A Montevallo Mural project is being launched this summer. The University of Montevallo is also home to an excellent College of Fine Arts and boasts the only Anagama kiln in the country fired by undergraduate students.

#### **Other Local Area Business Community**

These generators include corporations located in the Montevallo Industrial Park and several large-scale quarry companies that are located along S.R. 25 south and east of Montevallo.

#### **Additional Attractions and Points of Interest**

- The Ebenezer Swamp Research Center Environmental Educational Boardwalk
- Heart of Dixie Railroad Museum
- Aldrich Coal Mine Museum
- Shelby County Wine Trail – Ozan Vineyard and Cellars and Vizzini Farms Wineries
- Bass Fishing on Lay Lake
- University Lake and Anagama Kiln
- Montevallo Golf Club
- Canoeing and Tubing on the Cahaba River at the Cahaba River Park
- James W. Shepherd Observatory
- Davis Falls
- Alabama Firefighter's Museum and Education Center (under development) in Calera

## EXHIBIT F- Demographic Profiles of Shelby County, Alabama and the City of Montevallo

MONTEVALLO DEMOGRAPHIC PROFILE								
2000 and 2010								
	MONTEVALLO		SHELBY COUNTY		ALABAMA		U.S.	
	2010	2000	2010	2000	2010	2000	2010	2000
<b>POPULATION</b>								
Total Population	6,323	4,825	195,085	143,293	4,779,736	4,447,100	308,745,538	281,421,906
Population in Households	5,374	3,931	192,511	141,618	4,663,920	4,332,380	300,758,215	273,643,273
Population in Group Quarters	949	894	2,574	1,675	115,816	114,720	7,987,323	7,778,633
Persons per Household	2.29	2.30	2.60	2.59	2.48	2.49	2.58	2.59
Persons per Family	2.94	2.96	3.08	3.04	3.02	3.01	3.14	3.14
<b>AGE</b>								
Under 5 Years	366	236	13,136	10,718	304,957	295,992	20,201,362	19,175,798
5 - 9 Years	313	221	14,202	10,616	308,229	315,345	20,348,657	20,549,505
10 - 14 Years	296	253	14,369	10,398	319,655	320,252	20,677,194	20,528,072
15 - 19 Years	674	726	12,688	9,332	343,471	324,580	22,040,343	20,219,890
20 - 24 Years	1,309	1,182	10,697	8,310	335,322	306,865	21,585,999	18,964,001
25 - 34 Years	859	587	27,125	22,627	608,922	603,015	41,063,948	39,891,724
35 - 44 Years	557	466	29,772	25,597	619,501	685,512	41,070,606	45,148,527
45 - 54 Years	891	390	29,433	21,495	693,854	600,209	45,006,716	37,677,952
55 - 64 Years	561	289	23,036	12,021	588,033	415,532	36,482,729	24,274,684
65 Years and Over	697	475	20,627	12,179	657,792	579,798	40,267,984	34,991,753
Median Age	27.0	23.4	36.9	34.9	37.9	35.8	37.2	35.3
<b>PERCENT DISTRIBUTION BY AGE</b>								
Percent Under 5 Years	5.8	4.9	6.7	7.5	6.4	6.7	6.5	6.8
Percent Age 5 - 9	5.0	4.6	7.3	7.4	6.4	7.1	6.6	7.3
Percent Age 10 - 14	4.7	5.2	7.4	7.3	6.7	7.2	6.7	7.3
Percent Age 15 - 19	10.7	15.0	6.5	6.5	7.2	7.3	7.1	7.2
Percent Age 20 - 24	20.7	24.5	5.5	5.8	7.0	6.9	7.0	6.7
Percent Age 25 - 34	13.6	12.2	13.9	15.8	12.7	13.6	13.3	14.2
Percent Age 35 - 44	8.8	9.7	15.3	17.9	13.0	15.4	13.3	16.0
Percent Age 45 - 54	14.1	8.1	15.1	15.0	14.5	13.5	14.6	13.4
Percent Age 55 - 64	8.9	6.0	11.8	8.4	12.3	9.3	11.8	8.6
Percent Age 65 Years and Over	11.0	9.8	10.6	8.5	13.8	13.0	13.0	12.4
<b>RACE AND ETHNICITY</b>								
White	4,438	3,500	161,943	128,671	3,275,394	3,162,808	223,553,265	211,460,626
Percent White	70.2	72.5	83.0	89.8	68.5	71.1	72.4	75.1
Black or African-American	1,556	1,249	20,732	10,606	1,251,311	1,155,930	38,929,319	34,658,190
Percent African-American	24.6	25.9	10.6	7.4	26.2	26.0	12.6	12.3
Other	217	48	9,726	2,989	181,780	84,183	37,253,881	28,476,862
Percent Other	3.4	1.0	5.0	2.1	3.8	1.9	12.1	10.1
Two or More Races	112	28	2,684	1,027	71,251	44,179	9,009,073	6,826,228
Hispanic	363	76	11,567	2,910	185,602	75,830	50,477,594	35,305,818
Percent Hispanic	5.7	1.6	5.9	2.0	3.9	1.7	16.3	12.5

## EXHIBIT F- Demographic Profiles of Shelby County, Alabama and the City of Montevallo (continued)

MONTEVALLO DEMOGRAPHIC PROFILE								
2000 and 2010								
	MONTEVALLO		SHELBY COUNTY		ALABAMA		U.S.	
	2010	2000	2010	2000	2010	2000	2010	2000
<b>INCOME</b>								
Total Households	2,074	1,745	71,759	54,601	1,883,791	1,737,385	114,567,419	105,539,122
Less than \$10,000	319	368	2,692	3,191	186,689	250,526	8,757,190	10,067,027
\$10,000 to \$14,999	118	141	2,072	2,310	130,766	140,880	6,668,865	6,657,228
\$15,000 to \$24,999	355	261	5,665	4,612	242,846	257,393	13,165,380	13,536,965
\$25,000 to \$34,999	159	194	6,486	5,476	213,143	236,732	12,323,322	13,519,242
\$35,000 to \$49,999	206	256	9,095	8,745	268,333	286,612	16,312,385	17,446,272
\$50,000 to \$74,999	238	219	13,274	11,969	321,908	298,347	20,940,859	20,540,604
\$75,000 to \$99,999	313	85	10,845	7,729	192,900	134,135	13,526,500	10,799,245
\$100,000 or More	366	221	21,630	10,569	264,625	132,760	22,872,918	12,972,539
Median Household Income (dollars)	40,417	30,541	68,380	55,440	42,081	34,135	50,046	41,994
Median Family Income (dollars)	75,500	40,164	81,406	64,105	52,863	41,657	60,609	50,046
Per Capita Income (dollars)	19,741	16,468	33,978	27,176	22,984	18,189	26,059	21,587
<b>POVERTY</b>								
Total Persons Living Below Poverty Level	992	969	13,681	8,932	786,544	698,097		33,899,812
Percent of Persons Living Below Poverty Level	20.9	24.4	7.4	6.3	17.1	16.1	13.8	12.4
Total Families Living Below Poverty Level		148		1,892		153,113		6,620,945
Percent of Families Living Below Poverty Level	11.8	14.5	5.4	4.6	13.0	12.5	10.1	9.2
Total Female Head of HH Below Poverty Level		101		822		85,644		3,315,916
Percent Female Head of HHs Below Pov Level	30.5	34.8	22.6	19.0	36.3	35.6	28.9	26.5
<b>SCHOOL ENROLLMENT</b>								
Enrolled in Grades K - 12	632	669	35,310	26,646	832,101	837,350	54,323,467	54,192,083
Enrolled in College	2,109	1,633	11,021	7,321	305,547	243,275	23,451,209	17,483,262
<b>EDUCATIONAL ATTAINMENT</b>								
Percent of Adults with High School Diploma	90.9	81	91.5	86.8	81.4	75.3	85.6	80.4
Percent of Adults with College Degree	31.2	30.7	39.6	36.8	21.7	19.0	28.2	24.4
<b>JOURNEY TO WORK</b>								
Total Workers Age 16 Years and Over	2,807	2,549	93,843	73,773	2,000,289	1,900,089	136,941,010	128,279,228
Car, Truck, or Van	2,232	2,136	87,843	70,267	1,894,534	1,810,902	118,123,873	112,736,101
Percent Motor Vehicle	79.5	83.8	93.6	95.2	94.7	95.3	86.3	87.9
Public Transportation (excl. Taxicab)	13	0	202	108	9,062	9,496	6,768,661	6,067,703
Percent Public Transportation	0.5	0.0	0.1	0.1	0.5	0.5	4.9	4.7
Walked to Work	301	322	958	702	25,007	25,360	3,797,048	3,758,982
Percent Walked to Work	10.7	12.6	1.0	1.0	1.3	1.3	2.8	2.9
Bicycle to Work	18	26	18	41	2,118	1,414		488,497
Percent Bicycle to Work	0.6	1.0	0.0	0.1	0.1	0.1	0.5	0.4
Worked at Home	243	58	4,594	2,381	50,558	39,303	5,924,200	4,184,223
Percent Worked at Home	8.7	2.3	4.9	3.2	2.5	2.1	4.3	3.3
Average Travel Time to Work	27.1	24.2	28.8	28.6	23.9	24.8	25.3	25.5
Pct of HHs with No Vehicles Available for Work	8.8	9.2	2.1	3.4	6.5	8.3	9.1	10.3
Pct of HHs with 1 Vehicle Available for Work	32.2	34.2	26.8	26.0	32.0	32.3	32.8	34.2



## EXHIBIT F- Demographic Profiles of Shelby County, Alabama and the City of Montevallo (continued)

MONTEVALLO DEMOGRAPHIC PROFILE								
2000 and 2010								
	MONTEVALLO		SHELBY COUNTY		ALABAMA		U.S.	
	2010	2000	2010	2000	2010	2000	2010	2000
<b>HOUSING</b>								
Total Housing Units	2,551	1,897	80,970	59,302	2,171,853	1,963,711	131,704,730	115,904,641
Occupied Housing Units	2,074	1,711	74,072	54,631	1,883,791	1,737,080	116,716,292	105,480,101
Vacancy Rate	18.7	9.8	8.5	7.9	13.3	11.5	11.4	9.0
Owner-Occupied	1,202	884	59,129	44,226	1,312,589	1,258,705	75,986,074	69,815,753
Percent Owner-Occupied	58.0	51.7	79.8	81.0	69.7	72.5	65.1	66.2
Renter-Occupied	872	827	14,943	10,405	571,202	478,375	40,730,218	35,664,348
Percent Renter-Occupied	42.0	48.3	20.2	19.0	30.3	27.5	34.9	33.8
One Unit, Detached	1,517	1,054	56,896	40,207	1,462,526	1,300,272	80,965,705	69,865,957
One Unit, Attached	35	43	5,203	2,511	38,844	38,560	7,661,929	6,447,453
Multifamily	845	701	9,179	7,531	331,334	300,569	34,416,477	30,549,393
Percent Multifamily	33.1	37.0	11.3	12.7	15.3	15.3	26.1	26.4
Mobile Homes	154	93	8,628	9,009	311,866	319,212	8,636,728	8,779,228
Percent Mobile Homes	6.0	4.9	10.7	15.2	14.5	16.3	6.6	7.6
Boat, RV, Van, etc.	0	6	77	44	1,943	5,098	110,226	262,610
Median Value Owner-Occupied Housing (\$)	148,500	93,400	193,900	146,700	117,600	85,100	179,900	119,600
Average Contract Rent (\$)	597	490	845	635	644	447	855	602
<b>YEAR HOUSING BUILT</b>								
1939 or Earlier	170	232	1,326	1,532	136,806	139,227	17,992,301	17,380,053
1940 to 1959	296	318	3,011	3,217	316,165	341,735	21,733,236	23,145,917
1960 to 1969	225	253	3,257	3,277	270,187	292,352	14,692,127	15,911,903
1970 to 1979	365	396	10,852	10,218	389,481	400,128	21,105,659	21,438,863
1980 to 1989	506	243	16,136	15,262	339,161	347,272	18,408,424	18,326,847
1990 to 1999	545	455	23,903	25,796	404,415	442,997	18,302,121	19,701,058
2000 to 2009	444	- - -	20,275	- - - - -	290,298	- - - - -	19,557,197	- - - - -
<b>EMPLOYMENT</b>								
Total Employment	2,868	2,628	95,469	74,604	2,036,867	1,920,189	139,033,928	129,721,512
Agriculture/Forestry/Fishing/Hunting/Mining	56	13	1,073	732	38,188	37,310	2,646,975	2,426,053
Construction	214	115	7,965	6,415	160,208	145,809	8,686,813	8,801,507
Manufacturing	195	221	7,107	7,639	296,253	352,566	14,439,691	18,286,005
Wholesale and Retail Trade	541	421	15,768	12,368	308,263	303,797	20,171,474	19,888,473
Transportation, Warehousing, and Utilities	197	79	4,184	3,718	107,651	101,588	6,843,579	6,740,102
Information	77	29	3,615	3,672	37,900	42,754	3,015,521	3,996,564
Finance, Insurance, and Real Estate	162	161	10,352	8,145	117,422	110,743	9,275,465	8,934,972
Services	1,368	1,523	41,287	29,704	859,976	726,707	66,794,217	54,435,821
Public Administration	58	66	3,118	2,211	111,006	98,915	7,187,193	6,212,015
<b>PERCENT EMPLOYMENT BY SECTOR</b>								
Percent Agri/Forestry/Fishing/Mining	2.0	0.5	0.6	1.0	1.9	1.9	1.9	1.9
Percent Construction	7.5	4.4	7.2	8.6	7.9	7.6	6.2	6.8
Percent Manufacturing	6.8	8.4	7.1	10.2	14.5	18.4	10.4	14.1
Percent Wholesale and Retail Trade	18.9	16.0	15.9	16.6	15.1	15.8	14.5	15.3
Pct. Transportation, Warehousing, & Utilities	6.9	3.0	4.6	5.0	5.3	5.3	4.9	5.2
Percent Information	2.7	1.1	3.1	4.9	1.9	2.2	2.2	3.1
Percent Finance, Insurance, and Real Estate	5.6	6.1	11.2	10.9	5.8	5.8	6.7	6.9
Percent Services	47.7	58.0	46.7	39.8	42.2	37.8	48.0	42.0
Percent Public Administration	2.0	2.5	3.7	3.0	5.4	5.2	5.2	4.8