

Town of Vernon Outdoor Recreation Master Plan RFP

Issue Date:

August 2, 2022

Submission Deadline:

September 29, 2022

**PROPOSALS RECEIVED AFTER THE SUBMISSION DEADLINE
WILL BE RETURNED UNOPENED**

RFP Coordinator:

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1.0 General Information

1.1 Introduction

The Town of Vernon (hereafter referred to as "Town") is requesting proposals (hereafter referred to as "RFP(s)") from qualified, consulting firms (hereafter referred to as "Firm(s)") to provide professional services to the Town to develop a Comprehensive Outdoor Recreation Master Plan (hereafter referred to as "Plan") resulting in a Strategic Plan. The selected firm will have proven innovative approaches, experience and knowledge in park, facility and recreation planning, project management and ability to effectively blend sections, plans, documents, and concepts together, produce a concise and easily understandable plan, transfer, if available, real-time charts and spreadsheets to the Town and work closely with the Town Administrator, Planning Commission and Select Board in preparing the Plan.

The Plan will drive five-year planning, direct decision-making, and resources toward a clearly defined vision within five years and potentially its future, including development and maintenance of the parks, facilities, programs, open space, and recreation system, programming, facility operations and impacts on organizational structure and finances. The Plan will be a springboard for a five-year Strategic Plan. The Town of Vernon has outlined five business strategies "Keep Advancing the Town of Vernon in Leadership, Community and Industry" through five core areas: Innovation, Planning, Internal Operations and Processes, Training, and Communication. The Firm will analyze community needs, priorities, opportunities, using existing Town of Vernon Plans and documents while utilizing firm's own ideas and approaches to create a phased plan.

The Firm will create a **final Comprehensive Master Plan document** that connects multiple sections/chapters including but not limited, executive summary, sub-sections, appendixes, summary of the planning process, data collected, the analysis of forecasted needs, years of completion within five years and implementation strategies for review and approval by the Select Board following presentation. The Executive Summary should provide a clear direction over the next five years.

1.2 Description of Town of Vernon

The Town of Vernon was chartered in 1753. It has 11,652 acres at the southeast tri-state corner of NH and MA and serves a population of 2,100 residents. Year-round recreation, park and facility opportunities are available to the public. Vernon is a diverse community that values recreation and community.

Policy making and legislative authority are vested in the Town of Vernon Board, which consists of five board members. The Select Board is responsible, among other things, for passing ordinances, adopting the budget, appointing committees and hiring the Town Administrator and Town Attorney. The Town Administrator is responsible for carrying out the policies and ordinances of the Board, for overseeing the day-to-day operations of the Town, and for hiring the Town's department heads. Town of Vernon is committed to connecting the community with quality recreation through diverse programs, facilities and open space. The Town of Vernon also boasts that it has its very own museum, Vernon Heritage Museum. The museum chronicles the history of Vernon from a small rural town to the economically efficient village of today. Recreational activities available in Vernon include a pool, tennis, basketball/softball, disc golf, softball/baseball, a public boat launch on the Connecticut River, numerous walking trails are available at the Recreation Department and Town Forest. has a public There are snowmobiling trails that are popular recreational spots in the winter months. The recreational activities we offer bring meaning, purpose, and pleasure to our community residents.

1.3 Background

The Town utilizes planning to define a consistent vision and strategic priorities and keeps advancing the Town in five-year increments due to trends and events occurring more frequently which impacts the industry. These impacts force the organization to imagine while executing the desired future of its services, recognizing the realities of the external operating environment and developing an action plan to make the desired outcomes a reality.

By providing the variety of recreational opportunities and programs to the Vernon community, the Town of Vernon's overall philosophy is to project revenues and expenses conservatively, use sound financial planning to achieve the strategic priorities, utilize existing reserves to maintain assets, take steps and allocate resources, attract and retain recreational visitors and staff, and provide a balanced level of services and programs expected within a diverse community. This will allow the Town of Vernon to meet needs and make residents feel welcomed and valued, keep advancing parks, programs and facilities, and maintain a healthy financial condition.

Furthermore, staff recognizes that to ensure long-term financial sustainability, the Town of Vernon must consider evaluating programs/facilities, while putting resources into areas with potential and/or current growth. The Town of Vernon has had the fiscal agility to use operational funding and/or reserves to address some capital maintenance needs, maximize and grow revenue, hire innovative staff, and undertake key strategic initiatives for long-term success. Although, a major challenge has been a growing community without the internal organizational structure and various plans/assessments aligning with the growth. The Town of Vernon tends to be reactive than proactive. To continue managing a growing community, fast paced environment and maintaining its aging infrastructure and offer the programs, services and new facilities and amenities the community desires, the Vernon Planning Commission and Vernon Select Board and staff must continue to make measured decisions, balance future community needs against the Town of Vernon's sound fiscal condition, implement cost recovery models, compliment diverse community and determine realistic and financially feasible future priorities during the next comprehensive planning process. The key factors with the Town of Vernon's planning processes include the following:

- Analyze needs assessment results and identify the gaps to be addressed to meet those needs and interests;
- Engage stakeholders in the planning process to build consensus and support for the effective development and implementation of plans;
- Understand the community, Town of Vernon's culture and organizational structure and provide recommendations how the structure can execute a plan;
- Assess the future vision of the organization and determine the strategic priorities to achieve that vision;
- Foster an awareness of the organization's presence and impact on the community;
- Develop a "living and real-time document," which reflects the outcomes of the process and

provides clear direction on actions to be taken to address strategy and provides a foundation for the development of all other planning and operating documents (e.g., budget, capital, community survey, facility, and marketing plans); and

- Ensure the most effective use of the organization's resources by focusing decision making and spending on strategic priorities.
- Offer diverse programs and facilities allowing for balance and equity throughout the community.

1.4 RFP Coordinator

Upon release of this RFP, all communications concerning this proposal request should be directed to the RFP Coordinator listed below. Unauthorized contact regarding this RFP may result in disqualification. Any oral communications will be considered unofficial and non-binding to the Town of Vernon. The respondent should rely only on written statements issued by the RFP Coordinator.

Shelly Walker
Town Administrator
Town of Vernon
567 Governor Hunt Road
Vernon, Vermont 05354
vernonta@vernonvt.org
Office (802)257-2138

1.5 Questions Regarding the RFP

Requests for clarification or additional information must be made in writing to the RFP Coordinator prior to the date specified in the RFP Schedule. Written responses to all requests will be furnished to all potential proposers as determined by the Vernon Planning Commission receipt of a completed RFP Acknowledgement Form (Attachment A). The RFP Coordinator will be unable to respond to requests for additional information or clarification received after 5:00 p.m. CST, September 29, 2022.

1.6 RFP Amendments

In the event of a material modification, all potential proposers will be notified of an amendment to the RFP as determined by the Town of Vernon's receipt of a completed RFP Acknowledgement Form (Attachment A). If deemed necessary by the Vernon Planning Commission, proposers will be given an opportunity to modify their proposal in the specific areas that are affected by the modification.

2.0 Scope of Services

The specific work to be undertaken by the successful firm for the comprehensive master plan process is described in this Section, and respondents should include in their proposals how they will assist the Town of Vernon with completing this work as well as any new ideas that may have not been included in the Scope of Services. The work described in this Section is considered to be the minimum required to complete this process. In their submittals, firms should propose additions or edits to this scope that lend to the best process. The Town Administrator and Planning Commission will be evaluating which firm can most effectively blend multiple documents, spreadsheets, ideas and plan into one Comprehensive Master Plan and provide expertise, knowledge and ideas to create a realistic plan. Please consider, the Town of Vernon is not looking for Architects to develop conceptual design plans and/or individual park site planning. Following the firm's selection process, a meeting will be held with the successful firm to negotiate the final scope of work and a contract for services. Therefore, the Town of Vernon reserves the right to make revisions to the final scope of work.

2.1 Project Kick-off

The first step in the project will be to hold an onsite meeting with the Vernon Planning Commission to establish objectives for the project, including confirming roles and responsibilities and finalizing the project methodology, scope of services, timeline and format and content of deliverables.

2.2 Review Existing Needs Assessment

A key component in creating the Plan will be to analyze and develop a needs assessment report.

2.3 Collect & Analyze Data

Review past plans and related documents such as, but not limited to, 2016 Vernon Community Visit Report and Action Plan, 2017 Village Center Master Plan, 2018 Town Plan, 2021 Vermont Yankee Site Restoration and Redevelopment Plan, Financial Report, Organizational Structure, Policy Manuals, Technology Assessments, Replacement Schedules, Business Strategies;

- Utilize and/or compile data on participation, operations, technology, programming, programming space and land use trends and acquisition opportunities;
- Utilize and/or compile and/or use existing inventory documents of outdoor facilities, including capacity, amenity found within the recreation department as well as its functionality, accessibility, condition and convenience, etc.;
- Review available funding and financing strategies that are options for funding future improvements; and
- Revise usable and workable definitions and recommendations for designated park and open space with acreages and parameters defined as appropriate.

2.4 Hold Stakeholder Meetings

The planning process must result in a shared, clearly defined vision for the Town of Vernon driven by input from the community and stakeholders. Public involvement is extremely important to the Town of Vernon and adds value to the decision-making processes. The successful firm will propose a stakeholder outreach strategy that describes how the community, Planning Commission and Select Board will be provided opportunities to participate in the development of the Plan. In their submittals, firms should at a minimum provide the following:

- Define the stakeholders
- Ensure the residents, user groups and other stakeholders are provided an opportunity to participate in the development of the Plan;
- Act as professional facilitators to gather specific information about services, use, preferences, and any agency strengths, weaknesses, opportunities and threats;
- Provide written records and summaries of the results of all stakeholder and communication strategies;
- Throughout the entire process, help to build consensus and agreement of the plan and if consensus is not possible, provide information for informed decision making for the staff and Town of Vernon Board.

2.5 Deliverables

The Town of Vernon has various documents that are completed, in progress but the Firm is expected to review, update existing documents and/or create an easier spreadsheet to identify and blend the priorities. Existing documents include Site Plans for Facilities and Parks, Capital Maintenance Asset Inventory, Lifespan and Condition, Capital Development Concepts and Priorities over the next five to seven years, Five-Year Financial Forecast Plan, Human Capital and Resources Management Plan, ADA Transition Plan, Technology Inventory & Assessment, Parking Lot and Path Assessments, Park and Facility Classifications, Park Inventory and Map, Land Acquisition Opportunities, Community Development and Impact Fees, Data and Statistical Reports, and Natural Areas/River Priorities and Plan. Once again, the Town of Vernon is firm is expected to review and update the existing documents as stated above.

The Town of Vernon needs the following deliverables:

- Program and Facility Operations and Maintenance Plan
- Cost of Service (Fees and Charges)

Firm is expected to provide options of additional sections that may compliment and/or be added to Comprehensive Master Plan allowing for better decision making with strategies, goals and recommendations.

2.6 Analysis of Forecasted Needs to Determine Town of Vernon's Strategic Direction

The Firm will review needs assessment outcomes with Town of Vernon staff and facilitate a review of the Town of Vernon's strategic direction to identify and affirm the vision. This step of the planning process is vital for clarifying the Town of Vernon's organizational direction for action planning, decision making, and resource allocation. To determine the Town of Vernon's strategic direction, the Firm will assist the Town of Vernon with accomplishing the following:

- Review the Town of Vernon's purpose, aspiration, and organizational values;
- Conduct a situational analysis and environmental scan utilizing the needs assessment data to determine gaps in what is being provided versus the needs and interests identified; and
- Develop a list of critical issues and opportunities based on the results of the situational analysis and environmental scan.

2.7 Develop Recommendations, Priorities & Implementation Strategies

To ensure that the Plan is implementable upon its adoption by the Town of Vernon Select Board, it must include realistic, feasible, and clearly-defined planning scenarios. Based on new ideas, existing planning information and the Town of Vernon's strategic direction, the firm will be expected to develop the following:

- Prioritized recommendations to meet current and future needs through, but not limited to, land acquisition, construction or development of indoor and outdoor facilities, development of additional recreational amenities, park maintenance, etc.;
- Review existing staff recommendations for addressing operations, staffing, maintenance, technology, programming, services, and funding need to support implementation of this Plan; and

- Evaluation of the feasibility, cost-effectiveness/return on investment of suggested strategies and recommendations.
- Establish the following priorities: Facilities (Pool, Baseball/Softball field, Tennis court, Disc Golf), Museum, Finance/HR, Information & Technology, Marketing and Communication, Community Relations, Sponsorships and Grants, Recreation Programs, Parks/Trails/Natural Areas/River, Capital Maintenance and Capital Development.

2.8 Create Action Plan – Strategic Plan

The firm must develop a real-time action strategic plan which includes goals, objectives, strategies, ideas, priorities, budget support, and funding mechanisms for five years. The Action Plan must be a matrix with narrative while being easily readable and concise. It must be phased with priorities including various sections to advance the Town of Vernon and importantly, it must consider community growth and organizational structure. It is important to build the Strategic Plan upon “Keep Advancing the Town of Vernon in Leadership, Community and Industry” through five core areas:

Innovation, Planning, Internal Operations and Processes, Training, and Communication.

2.9 Final Report & Presentation

The selected Firm shall submit a draft and final report which summarizes the findings, priorities, conclusions and include a clear demonstration that the firm has fulfilled all of the elements contained in the agreed upon scope of work. The Plan must include key sections/chapters to establish a realistic and manageable “road map” for the Town of Vernon over the next five years.

The Firm will make two (2) on-site presentations to report and summarize findings to the Town of Vernon Board and staff. The reports must be in an easy-to-understand format with charts, graphs, maps and other data as needed to support the plan and its presentation to the appropriate audiences. The final report must be submitted as follows:

- A color version of the draft Master Plan document consisting of one (1) printed and bound color copy and an electronic copy in an Adobe Portable Document Format (PDF).
- A color version of the final Master Plan document consisting of fifteen (15) printed and bound color copies, one (1) printed and unbound copy and an electronic copy in an Adobe Portable Document Format (PDF).

3.0 Staff Services & Progress Reporting

3.1 Services Provided by Staff

The Town of Vernon will assist the Firm in managing the operational aspects of the project and coordinating work with the relevant parties. The Town of Vernon will provide overall support for project tasks and assign Department Heads to serve as the lead liaison for specific aspects and/or sections of the project. The Town Administrator will provide all existing documentation (as requested by the consultant during final scope review) and compile contact information for staff and local organizations. Town of Vernon staff will also schedule, coordinate the availability of staff based on their work schedules and make all necessary arrangements for meetings and interviews conducted by the consultant during the course of this project.

The Firm and Town Administrator will hold progress meetings in person or over the phone as often as necessary, but in no case less than once per month until a final plan is approved by the Town of Vernon Select Board. The Town Administrator shall schedule the progress meetings, as necessary, at key times during the development of the Plan. The Firm shall provide the Town Administrator with at least one (1) copy of all completed or partially completed reports, studies, forecasts, maps or plan as deemed necessary by the Town Administrator.

4.0 Proposal Content & Submission Inform

4.1 Submitting Proposal, Proposal Components & Evaluation Criteria

All respondents to the RFP must include the items provided in the following list. All the listed items should be addressed completely and should follow, as closely as possible, the order and format in which it is listed below. These categories and criteria will be major considerations in the evaluation and determination of the most

qualified, innovative and capable Firm(s). The sequence of the listing is not intended to reflect the relative weight of each category.

1. Letter of transmittal

- a. Statement indicating an understanding of the work to be performed and interest in performing the scope of work;
- b. Discuss consultants' availability over the next 6-12 months; and
- c. Identify one (1) key contact person for communicating with the Town of Vernon on the proposal and all project-related matters.

2. Qualifications/Project Portfolio

- a. Areas of specialization;
- b. Practice philosophy;
- c. Years in the business and history of Firm; and
- d. Examples of three (3) to five (5) projects the Firm took a lead role in the preparation of a Comprehensive Master Plan. The projects should be comparable in complexity, size, scope, and discipline (as described in the Scope of Work section) and been undertaken during the past five (5) years.

3. Project Management

- a. Introduction to the team (all firm staff and sub-consultants assigned to complete work on the project), including resumes for all the key personnel, which provide educational background/training, experience and detailed descriptions of roles played on past projects;
- b. Services/functional roles to be performed by each team member (including all sub-consultants);
- c. Location of each team member;
- d. Availability and commitment of assigned professionals who will undertake the scope of work; and
- e. Technical resources of the Firm and any sub-consultants.

4. Methodology and Process to Complete all Phase of Project

- a. Describe the vision, strategic overview and approach to the project;
- b. Express how the components above reflect your qualifications for this project;
- c. Discuss what parameters you will engage to develop a project that will be creative, logical, and engaging;
- d. Include detailed descriptions of the procedures and methods you propose to use to complete all tasks within the scope of work;
- e. Discuss tasks, timelines and anticipated deliverables for each phase of the project;
- f. Include the proposed process and methods to assure quality, cost, and schedule control; and
- g. Explain in the proposal all supporting studies, models, and assumptions that will be developed or used as part of the study.

5. References

- a. List at least three (3) to five (5) references we may contact (preferably from the projects provided in 2(d) of this section that have been undertaken during the past five (5) years) with client contact information (current email and telephone).
- b. Indicate project names and the personnel assigned to this project (including all sub-consultants) roles and involvement in each project.

6. Schedule

- a. Provide a proposed detailed project work schedule with a start date on or about **October 17, 2022** (contingent upon negotiation of a final scope of work); all meetings that need to be scheduled should be built into the timeline (e.g., initial meeting with staff to review project schedule, strategic direction review, presentations of the final report, etc.).
- b. Include time frames for each major component of the scope of work and target dates for completing each phase of the project.

7. Fee Proposal - one (1) copy in a sealed envelope (see also 4.2). **TOTAL (ALL) COSTS MUST BE SUBMITTED.**

- a. Include a total “not to exceed” figure for the scope of work (based on the estimated level of effort to be spent on each task);
- b. Include itemized schedule of all expenses by phase (reimbursable expenses listed separately), including a composite schedule of hours estimated for included tasks;
- c. Provide hourly rates for all team members, sub-consultants and staff levels;
- d. Describe the methodology for billing reimbursable expenses (such as travel, production of documents, purchase of data, etc.); and
- e. Describe method for billing additional services beyond the initial scope of work (beyond approved not-to-exceed amount).

4.2 Assessment of Fees/Charges Proposal and RFP Response

One (1) copy of the cost of fees/charges must be included in a separate, clearly marked, sealed envelope with appropriate detail reflecting all costs. The firm is required to separate cost by the major sections with travel. So, the Town of Vernon requests total associated hours each task and break out by tasks and timeline.

Do not include any reference to fees in the body of your RFP response. Failure to comply with this provision will result in disqualification of your firm. The Town of Vernon reserves the right not to fund any portion of the firm’s proposal.

RFP responses shall be sent to the RFP Coordinator by email or U.S. Mail (digital copy required, hard copy optional) prior to the submission deadline.

4.3 Understanding & Approach of Scope of Work

Proposal shall describe the approach to the scope of work described in the Scope of Work section of this RFP, including process and schedule. Firms are encouraged to make suggestions to amend the scope of work to achieve the project goals. This criterion will be evaluated based on the proposer’s understanding of the project objectives and ability to demonstrate a process that efficiently and effectively achieves the desired outcomes. Reasoned creativity is encouraged. The Town of Vernon anticipates modifying, where appropriate, the objectives and/or scope of work listed in this RFP based on the firm’s experience and expertise in completing similar projects.

4.4 Disclosure

Proposal will disclose any professional or personal financial interest which could be a possible conflict of interest in contracting with the Town of Vernon. Consultant shall further disclose arrangements to derive additional compensation from various products or services, including financial. The firm must also list all current and unresolved litigations, arbitrations, or mediations of the firm in its proposal.

5.0 Selection of Consultant

5.1 Selection Process

The Town of Vernon will select a firm on the basis of its ability to respond to the RFP requirements, the qualifications and expertise of the team working on this project, past performance on similar projects, the time

required to complete project, methodology, firm resources and the firm's willingness to negotiate and execute an acceptable written agreement.

After a thorough review by the Vernon Planning Commission and Economic Development members of the proposals submitted by respondents to this RFP, a short list will be created of the firms that meet the requirements outlined in this RFP and those firms will be required to make a presentation on their qualifications and proposals to the Planning Commission. Based on these interviews, the Planning Commission will recommend to the Town of Vernon Select Board the firm that are the best fit for the Town of Vernon and this project.

All proposals will be afforded fair and equal treatment with respect to any opportunity for discussion and revision. Any such revision may be permitted after submission and prior to award for the purpose of obtaining the best and final offer at the discretion of the Town of Vernon. When conducting negotiations, the Town of Vernon will not disclose information from proposals submitted by competing firms.

6.0 Timeline of Selection Process & Project

The timeline for selecting a firm and anticipated project schedule is as follows:

Item of Action

| | |
|--|---------------------------|
| Request for Proposal Issued | August 2, 2022 |
| Questions on Request for Proposal Due | September 5, 2022 |
| Responses to Questions Issued | September 15, 2022 |
| Deadline for Proposal Submission: | September 29, 2022 |
| Firm Oral Presentation/Interviews with Vernon Planning Commission | October 12, 2022 |
| Contract Finalized | November 9, 2022 |
| Potential Approval of Firm by Town of Vernon Select Board: | November 15, 2022 |
| Anticipated Project Start: | December 1, 2022 |
| Anticipated Completion: | Spring/Summer 2023 |