



**REQUEST FOR PROPOSALS**  
**Professional Planning Services**  
**Town of Elon**  
**Recreation and Parks Master Plan**

*Innovative Strategies for Providing Recreational Services*

**Re-Advertisement**

Issued: August 11, 2017

Proposals must be received by 5:00 PM ET on September 11, 2017.

**I. INTRODUCTION**

The Town of Elon (hereafter “Town”) is requesting proposals from qualified planning and design firms to provide professional services to develop a recreation and parks master plan to guide future decisions regarding town parks, facilities, programs, services, and staffing. The Town is planning for fiscally responsible and sustainable future growth and program development based on a strong vision and mission.

Recreational opportunities look much different today than they have in the past. The Town would like to focus on delivering quality, easily accessible, and amenity-rich park and recreation areas that will serve today’s residents and visitors. With continued population growth and changing resident demands and needs, having a cohesive plan that accounts for adaptable program and space recommendations is critical. The Town desires to continually stress the wide range of ecosystem benefits stemming from sustainable park design, plantings, and use of “green” infrastructure.

The Town is also interested in continually elevating the importance of parks being investments in the local economy by potentially attracting new development and increasing property values. More importantly, the Town is interested in promoting the value that urban parks can play in improving the health of residents.

**II. GOALS & OBJECTIVES**

This project is intended to serve as a guide for policy decisions; prioritizing and balancing demands and opportunities; and providing a multi-year framework for evaluating future land acquisitions, park improvements, staffing, and other expenditures of public funds for parks and recreational activities. The plan will also guide the development of programming and educational opportunities including possible new and/or expanded programs and services in partnership with the education and the arts communities. The plan should align new investments with a community-driven vision and mission that integrates with a pursuit of parks, recreation, the arts, and environmental education. The Recreation and Parks Master Plan should be informed by several other plans including the December 2001 Elon Park Master Plan; The Town Strategic Plan – 2017; the Land Development Ordinance; the Bicycle, Lighting, and Pedestrian Plan Update; The Downtown Master Vision Plan; the Elon University Campus Master Plan; the Twin Lakes Community Strategic Plan; and regional recreation and parks plans.

Specifically, the Recreation and Parks Strategic Plan should incorporate:

- Development of a Recreation and Parks department identification through vision and mission statements that are based on identified values and priorities. The desire is for a sub-consultant specializing in organizational vision and mission statement development to lead strategic thinking and direction-setting through input from the Recreation and Parks Master Plan Steering Committee, town department staff, and other key stakeholders. Consideration should be given to business models, market awareness (trends, competition), and competitive advantage and opportunities. These elements should help to shape a new vision and mission to guide the final plan and recommendations.
- Analysis of existing conditions and changing demographics, population growth, and changes in youth and adult populations and patterns of recreation.
- Identification of new programs, services, and facility upgrades based on the values and priorities determined from citizen engagement activities to better engage all ages, including inclusive play and adaptive recreation (according to ADA standards) and expanding recreational opportunities and establishing stronger partnerships .
- Determination of a department action plan, including suggested future asset investments through annual capital improvement planning and an associated staffing plan.
- Consideration of how to connect parks through the development of corridors and greenways.

### **III. BACKGROUND**

The Town is located in the northwestern section of Alamance County and covers approximately 3.91 square miles with a population just over 10,000. In a 2016 Value Penguin analysis of all North Carolina cities with a population under 35,000, the Town ranked as the second “Safest Place to Live” in North Carolina. According to 2016 Census data, the breakdown of age groups in the generation analysis, the Town, home of Elon University, has the largest proportion (30.2%) of people less than 20 years old compared to ten surrounding communities and state and national statistics. The second largest proportion (27.7%) is 20 to 29 years old. The population 70 years of age or older stands at 15.7% making Elon the highest in senior population in the area.

There are two parks in Elon: Beth Schmidt Park – approximately 30 acres with 150 parking spaces - and Lawrence Slade Park – approximately 3.5 acres with minimal onsite parking. Facilities at Beth

Schmidt Park include an office and an indoor rental community center, three rental shelters, a playground two wedding areas (garden and gazebo) a dog park, and a walking trail. Lawrence Slade Park features include a playground, an amphitheater, two covered shelters, a basketball court, bocce ball and corn hole toss areas, and a walking path.

### III. CONSULTANT RESPONSIBILITIES

The selected firm will have proven experience and knowledge in recreation and parks planning and the ability to complete an assessment of facility needs and town resident recreational desires, trends, saturation, environment, and surrounding development plans. The proposal will address community responses; offer improvements; and identify enhanced recreational amenities that are currently unavailable in our area, but are feasible and complement neighboring programs and facilities.

The following tasks and categories of work are anticipated areas of focus: Vision, Mission, and Community Alignment; Inventory and Analysis; Anticipating Needs of Future Generations; Recommendations; and Action Plan. The task areas below are starting points. Firms are encouraged to tailor these work areas and add any that are based on their teams experiences with these types of planning efforts and delivery of final products. The final plan must incorporate all North Carolina Parks and Recreation Trust Fund (PARTF) elements required for the Town to be eligible for any State of North Carolina grant funds. The link to the PARTF website is: <https://www.ncparks.gov/more-about-us/parks-recreation-trust-fund>.

#### **ANTICIPATED TASK AREA 1: VISION, MISSION, CULTURE AND COMMUNITY ALIGNMENT**

Task 1.1: Public Participation Plan and Creation of Stakeholder Groups

Task 1.2: Stakeholder Interviews

Task 1.3: Department Vision and Mission Workshops

- i. Develop a real-time strategic planning cycle for the department addressing:
  1. Who we are? – understanding existing conditions and developing an identity statement to define Recreation and Parks as an organization.
  2. Where we are? – identifying potential competitors and our current market position and trends compared to competitors; development of scenarios and strategies.
  3. Where we want to go? – considering big questions of opportunities and challenges
  4. How we will get there? – formalizing strategy and outlining implementation steps.
- ii. Unite the following departmental functions to align decision-making:
  1. Organizational – vision, mission, trends, competitors, partners, and market position
  2. Programmatic – approaches, services, programs, and activities to achieve specific outcomes related to target audiences
  3. Operational – enhance administrative and staff efficiencies within the department

- iii. Strategic action plan will result in a concrete identity statement including vision and mission statement for the department in future planning and decision-making.
- Task 1.4: Development of Shared Cultural Outcomes for a Diverse Community

**Deliverables:**

- Public participation plan
- Interview notes and summaries of key issues and findings
- Kick-off presentations and outreach exercises and results
- Presentations of key findings
- Concrete identity and mission statement aligning future planning with cultural desires

**ANTICIPATED TASK AREA 2: INVENTORY AND ANALYSIS**

- Task 2.1: Assembly of data for property town-wide, including school-park shared sites
- Task 2.2: Spatial and legal review of property data
- Task 2.3: Analysis of park acreage balance across the Town and access to parks, comparison to state and national trends, identification of gaps in service
- Task 2.4: Mapping of opportunity sites, potential future acquisition, shared school-park sites, and priority areas of focus
- Task 2.5: Survey of key stakeholders on the issues of park access and distribution
- Task 2.6: Coordination meetings
- Task 2.7: Summary of opportunities and challenges

**Deliverables:**

- Summary maps and inventory data
- Open house exhibits and displays
- Key opportunity maps
- Issues, opportunities, and constraints report
- GIS database of all town parks and shared school-park sites

**ANTICIPATED TASK AREA 3: ANTICIPATING NEEDS OF FUTURE GENERATIONS AND VISION PLAN**

- Task 3.1: Statement of goals and objectives
- Task 3.2: Focus group meetings (residents, youth, school groups, key partners)
- Task 3.3: Identification and plan of new directions in creating recreational opportunities to better engage all ages
- Task 3.4: Identification and plan of new inclusive play and adaptive recreation strategies
- Task 3.5: Park classifications and model plans and recommendations for the town's system
- Task 3.6: Integrating green infrastructure and best practices, including model plans for recommended park class categories
- Task 3.7: Vision and recommendations for event types and spaces, representing town-wide cultural desires
- Task 3.8: Design standard recommendations for a nationally-recognized system and for sustainable operations needs

Task 3.9 Cost allocations based on park classifications and identified community needs

Task 3.10: Coordination meetings

**Deliverables:**

- Statement of goals and objectives
- Issue specific focus group presentations
- Draft recommendations
- Forum meeting materials
- Plan graphics representing recommendations and design standards
- Summary of focus group meetings
- Presentations on emerging trends and relevancy to Elon

**ANTICIPATED TASK AREA 4: RECOMMENDATIONS AND ACTION PLAN**

Task 4.1: Action strategies and timelines for five and ten years

Task 4.2: Implementation strategies and partners

Task 4.3: Implementation cost projections and timelines

Task 4.4: Preliminary and final design plans for key classifications and recommendations

Task 4.5: Coordination meetings

Task 4.6: Public open house

**Deliverables:**

- Implementation timeline
- Preliminary and final plan documents
- GIS layers and digital files for record and on-going database maintenance - All presentation materials and graphics
- Open House – Public Presentation

In summary, the final report will include:

1. Community profile and needs assessment
2. Vision and mission statements
3. Parks, facilities, services and programs, and trails analysis and recommendations
4. Parks Master Plan
5. Trails Master Plan
6. Financial plan

**IV. SUBMITTAL REQUIREMENTS**

All submittals shall provide the following information for consideration and state the period it shall remain in effect:

- A. **Introductory Letter:** Please include a cover letter summarizing your company's background, resources, relevant experience and cost estimates for the total project. Also, include the name, address, phone number, facsimile number and e-mail address of the company and the primary personnel who will be involved in the execution of the scope of services.

- B. **Descriptions of Company, Management, and Team Members:** Include descriptions of your organization and team. This should identify the project manager and the day-to-day contact person for the job. Please also include a resume for each of the key team members. The resumes should clearly demonstrate each individual's qualifications and professional experience in the area of central city wayfinding plans and programs.
- C. **Description of Subcontractors:** Identify any portion of the scope of work that will be subcontracted. Include company qualifications and key personnel, telephone number, and contact person for all subcontractors.
- D. **Experience with Similar Projects:** Include a brief description of at least three (3) previous projects performed that were similar in scope and complexity to this project. The information should include a description of the company's or individual's contributions to the project, including images or schematics of previous wayfinding design work.
- E. **References:** For each project noted in item d. above, include a contact name, address, current telephone number and e-mail address for the town's use in verifying the firm's past performance.
- F. **Qualifications.** Each submittal shall include a detailed statement of qualifications that is concise, well-organized and demonstrates the proposer's qualifications and experience applicable to the project. This shall include a brief description of similar experience for the company(s) and an explanation of how the staff proposed for this project assisted with prior projects. Contact information for each referenced job must be included.
- G. **Past Litigation:** Include a statement noting any litigation in which the firm or any of its primary personnel have been a party during the past five years.
- H. **Contract Terminations:** List any contracts of this firm that have been terminated for cause during the past five years.
- I. **Copyright Release**

Those firms responding to this RFP shall supply a copyright release in order for the Town to make copies of any copyrighted materials submitted.
- J. **E-Verify:** The firm submitting a proposal should be prepared to comply with the requirements of Article 2 of Chapter 64 of the General Statutes. Further, if subcontractors are utilized, the firm shall require the subcontractor to comply with the requirements of Article 2 of Chapter 64 of the General Statutes.
- K. **Iran Divestment Act:** The firm submitting the proposal must be able to comply with the Iran Divestment Act. The firm must certify it is not listed on the Final Divestment List created by the State Treasurer pursuant to N.C.G.S. 143-6A-4.
- L. **Insurance:** Depending on the type of work being performed, the firm submitting a proposal must be able to meet the town's insurance requirements.

M. **Project Approach.** A description of how the firm will approach individual and collective tasks necessary to address the proposed scope of work. This description is to include delineation of specific tasks to be undertaken in each project activity and a project schedule showing start and completion dates for all major tasks.

N. **Fee Proposal:** Provide itemized costs for the elements listed in the Scope of Work, including travel expenses to Elon. Please also include a fee schedule for supplemental charges that may be charged for unforeseen work tasks, such as additional design concepts. All fees listed shall include fringe benefits, indirect costs and profit. The firm's charge for reimbursable expenses should also be indicated. *The proposed fee will not be the sole criteria for selection of the firm.*

O. **Project Schedule:** Provide an explanation of how your firm would meet the project schedule and deliverables.

P. **Firm's Expectations of the Town.** A brief description of the services and tasks the firm would expect the Town to provide.

Please submit five copies of the proposal and one electronic copy in PDF format ([pcreech@ci.elon.nc.us](mailto:pcreech@ci.elon.nc.us)) by 5:00 p.m. on September 11, 2017 to:

Phyllis Creech, Recreation and Parks Administrator  
Town of Elon  
104 S. Williamson Avenue  
Elon, NC 27244

Proposals submitted after the deadline will be rejected. Teams composed of two or more firms should combine their statements into one package.

## V. CRITERIA FOR EVALUATION AND SELECTION

To ensure that the firm is capable of providing service to the Town, the following minimum qualifications must be met:

- Firm must be authorized to offer their services in North Carolina.
- Firm must have experience in dealing with municipal governments and have the ability to research, coordinate, and prepare functional reports for the Town.
- Firm must carry adequate professional liability insurance and errors and omissions insurance.
- The respondent firm must have successfully completed a minimum of three (3) municipal, county, or state projects related to this request for qualifications in the last five (5) years with references on each project listed to include the name of the current project manager and relevant information. Projects should have been completed on time and within budget. Any additional information you would like to provide about these projects would be advantageous.
- The firm and personnel must demonstrate experience in the development of park and trail master plans.

Selection will be based on evaluation of the following criteria:

1. Qualifications and Strength of Consultant's Team – 30%
2. Similar Project Experience, Including References – 25%
3. Project and Project Approach (Proposed Work Plan and Timeline) – 20%
4. Innovative Engagement Strategy – 15%
5. Clarity and Responsiveness of Proposal – 10%

All submittals shall contain the required information organized behind marked tabs. The first item in all submittals shall be a cover letter identifying a contact person for the RFQ/RFP process including phone, fax, e-mail address, and mailing address.

A selection committee will select the firm best qualified relative to the evaluation criteria listed herein. The selection process may include an invitation of up to three firms to make presentations to the selection committee.

## **VI. ANTICIPATED SCHEDULE**

- a. RFP Release (Re-Advertisement) – August 11, 2017
- b. Proposals Due – September 11, 2017, 5:00 p.m.
- c. Consultant RFP Reviews & Interviews – September 2017
- d. Contract Negotiations – October 2017
- e. Consultant Selection and Board of Aldermen Approval – November 14, 2017

Work on this project is anticipated to begin immediately after award of the contract.

## **VII. CONFIDENTIALITY**

Responses to the RFP will become public records and, therefore, will be subject to public disclosure. However, North Carolina General Statutes section 132-1.2 provides a method for protecting some documents from public disclosure. If the consulting firm follows the procedures prescribed by those statutes and designates a document confidential or trade secret, the Town will withhold the document from public disclosure to the extent that is entitled or required to do so by applicable law, and will return the document after selection.

## **VIII. EQUAL EMPLOYMENT OPPORTUNITY**

The Town does not discriminate in administering any of its programs and activities. The firm awarded the contract for work will be required to ensure that no person shall be denied employment, fair treatment or be discriminated against on the basis of race, color, religion, sex, gender, national origin, age, disability or genetic information.

## **IX. CONTRACTING**

Any contract developed for work shall be construed and enforced in accordance with the laws of the State of North Carolina. Any controversy or claim arising as a result of contracting shall be settled by an action initiated in the appropriate division of the General Court of Justice in Alamance County, North Carolina.



## **X. CONDITIONS AND LIMITATIONS**

The Town expects to select a firm from the proposals submitted, but reserves the right to request substitutions of firms. The Town also reserves the right to reject any or all responses to the RFQ/RFP, to advertise for new responses, or to accept any response deemed to be in the best interest of the Town. A response to this RFP should not be construed as a contract nor an indication of a commitment of any kind on the part of the Town nor does it commit either to pay for costs incurred in the submission of a response to this request or for any cost incurred prior to the execution of a final contract. The Town will reserve the right to dismiss any part or all of the contracted team when, in the town's opinion, the project is not moving as scheduled or is hindered in any way by the actions or personalities of team members.

The Town expressly reserves the right to accept or reject any and all submittals and is under no legal requirement to execute a resulting contract on the basis of this advertisement. The Town intends the material provided only as a means of identifying the various contractor alternatives and will base its choice on demonstrated competence, qualifications and evidence of superior conformance with criteria.

This RFQ does not commit the Town to pay any costs prior to the execution of a contract. Issuance of this material in no way obligates the Town to award a contract or to pay any costs incurred in the preparation of a response. The Town specifically reserves the right to vary all provisions set forth at any time prior to execution of a contract where it deems it to be in the best interest of the Town.

Negotiations will be initiated with the firm to define a detailed scope of work and services. The Town may obtain a cost estimate and will request the selected firm to submit a fixed fee proposal and cost breakdown for evaluation and negotiation. If a mutually satisfactory agreement cannot be reached with the first ranked firm, negotiations will be terminated with that firm. When such an agreement is reached, a recommendation will be made to the Town Manager to present the contract to the Board of Aldermen for execution, subject to the availability of funding. The Town reserves the right to reject any response at its sole discretion.

## **XI. COMPLIANCE**

The selected firm will be responsible for submitting E-Verify and Iran Divestment affidavits at contract execution and comply with all applicable federal and state statutes and municipal ordinances during the course of the project.

## **XII. QUESTION PERIOD**

Any questions regarding the proposal may be submitted by email to Phyllis Creech at [pcreech@ci.elon.nc.us](mailto:pcreech@ci.elon.nc.us). Questions must be submitted by Friday, August 25, 2017. Responses will be sent to all registered participants no later than Thursday, August 31, 2017.