

CENTRE REGION COUNCIL OF GOVERNMENTS



Request for Proposals
To Prepare a Comprehensive Recreation, Park and Open Space Plan for the
Centre Region Council of Governments
State College, Centre County, Pennsylvania

DCNR Project: BRC-TAG-23-52

June 13, 2018

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CENTRE REGION COUNCIL OF GOVERNMENTS

REQUEST FOR PROPOSALS

PROFESSIONAL CONSULTING SERVICES

The Centre Region Council of Governments (COG) invites the submission of proposals from qualified Consultants to prepare a Comprehensive Recreation, Park and Open Space Plan for the Centre Region Parks and Recreation Agency (Agency). The Agency is a department of the COG and it provides a wide range of public recreation services and maintains multiple facilities on the behalf of five municipal governments (College, Ferguson, Harris, Patton Townships and State College Borough) that are members of the COG and the Agency. A sixth municipality, Halfmoon Township, is not a member of the Agency but is a member of the COG and is participating in the study.

The purpose of this study is to evaluate and make forward thinking recommendations on the parks and recreation opportunities in the six Centre Region municipalities. A particular focus will be the facilities, programming, funding, and governance structure of the Agency.

The Plan will be used by the governing boards/councils of six municipalities, the Centre Region Parks and Recreation Authority, Centre Region Council of Governments' General Forum, and the Agency staff.

I. GENERAL

A. OBJECTIVE – COG seeks the assistance of a Consultant to prepare a Comprehensive Recreation, Park and Open Space Plan that provides direction for future recreation facilities, programs, and services.

B. CONTACT PERSON

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Mr. Steff will be the exclusive contact for all pre-contract communications, including questions pertaining to the RFP.

II. **BACKGROUND**

A. PROJECT STEERING COMMITTEE

To complete this project the Consultant will be collaborating with the COG Steering Committee for the Parks and Recreation Regional Comprehensive Plan. The Steering Committee was established by the General Forum of the Centre Region COG. The General Forum is the governing body of the COG and consists of 32 elected township/borough officials from six Centre Region municipalities. The eight members are six municipal representatives appointed by their governing boards/councils, Agency Director, and a representative from the Centre Region Parks and Recreation Authority. Staff support is provided by the COG Office Manager and the COG Executive Director.

This project is partially funded by a grant from the Community Conservation Partnership Program administered by the Department of Conservation and Natural Resources (DCNR), Bureau of Recreation and Conservation (Bureau). The Bureau has certain requirements and standards that must be met by the Centre Region Council of Governments (COG) and its contracted consultant. This Request for Proposals (RFP) has been prepared to meet these requirements and standards. The Bureau will monitor the project. Certain documents and drafts of documents will be subject to review and approval by the Bureau.

DCNR's grant agreement number is BRC-TAG-23-52.

Organization	Name	Affiliation
State College Borough	Tom Daubert	Council Appointee
College Township	Eric Bernier	Elected Official
Ferguson Township	Laura Dininni	Elected Official
Halfmoon Township	Kim Hyeseon	Township Parks + Rec Board
Harris Township	Bruce Lord	Elected Official
Patton Township	Susan Wheeler	Township Staff
Centre Region Parks and Recreation Authority	Chris Hurley	Authority Appointee
Centre Region Parks and Recreation Agency	Pam Salokangas	Agency Director
State College Area School District	Gretchen Brandt	Board of Directors

The overall responsibilities of the Steering Committee are to:

- Prepare a scope of work for the study. During this work the Steering Committee will identify what topics and questions the plan should address. Because 50% of the project cost is being provided by a DCNR grant, the scope of work will need to include the topics that are a condition of receiving the grant.
- Prepare a Request for Proposal (RFP). An RFP is a document that will be used to solicit proposals for consulting services to prepare the Plan as defined by the scope of work.
- Interview consultants who have submitted an RFP.
- Review and score all the RFPs received.
- Prepare a recommendation to the General Forum for an award of a proposal for consulting services.
- Assist the consultant in preparing the Parks and Recreation Regional Comprehensive Plan.
- As individual committee members, keep your board/council current on discussions occurring at the meetings of the Steering Committee.

Meetings of the Steering Committee are open to the public and meeting notices will be publically advertised in accordance with state law. Meeting minutes will be kept and distributed with the meeting agendas.

B. CENTRE REGION COUNCIL OF GOVERNMENTS

The Centre Region is located in the south central portion of Centre County, Pennsylvania. It is comprised of the State College Borough and College, Ferguson, Halfmoon, Harris, and Patton Townships. The Centre Region occupies an area of 151 square miles. The population of the Centre Region is approximately 98,000, about two-thirds of the county's population. Of this, approximately 46,000 are students attending the University Park Campus of The Pennsylvania State University. The Centre Region is one of the fastest growing communities in Pennsylvania. During 2017 approximately \$266 million in new construction occurred in the six municipalities. Geographically, the Centre Region corresponds to the service area of the State College Area School District. The fastest growing population cohort are individuals over 60 years of age. Because of the Centre Region's safety, leisure, and educational opportunities, and beautiful, natural environment, the Centre Region has become a destination community for retirees.

The Centre Region COG is a voluntary association of the six Centre Region municipalities. It was formed in 1969 to provide public services, prepare regional plans, and to exchange information. The governing body of the Centre Region COG is the General Forum, comprised of all 32 elected officials from the six participating municipalities.

C. CENTRE REGION PARKS AND RECREATION AGENCY (Agency)

The Centre Region Parks and Recreation Agency (Agency) was formed in 1966 and evolved from a program that was operated and funded by the State College Area School District to become an Agency of the Centre Region COG.

Agency personnel are employees of the COG, and work year-round to provide a full-service parks and recreation agency to include the following service areas: parks management and maintenance, aquatics facilities and programming, nature center facility and programming, active adult facility and programming, regional parks and related special events and programming, as well as general community programming and special events.

The Agency's Mission Statement is *"to provide Centre Region residents with a variety of opportunities which enrich lives and build community."* This is accomplished by providing opportunities through recreation, education, health and wellness, sustainability, and conservation.

As part of the 2015-2020 Strategic Plan, the Agency's Vision Statement is noted as *"Centre Region Parks and Recreation is dedicated to serving residents and visitors of all ages and on behalf of the participating municipalities, as a "Recreation Destination," providing a variety of opportunities that enrich lives through programs, facilities, leadership resources, and technical assistance."*

The Centre Region Parks and Recreation Agency follows these Guiding Principles in daily work:

- Provide residents and visitors with a year-round menu of age-appropriate, active and passive recreation opportunities.
- Offer recreation opportunities at an affordable cost that reflects the partnerships involving the participating municipalities and community groups.
- Provide services within the approved budget amounts to maximize the value of the prior municipal investments in parks and recreation services.
- Function within the governmental structure of the Centre Region COG and its participating municipalities, the Authority and state/federal laws.
- Engage staff with the appropriate skills, tools, training and certifications necessary to successfully initiate and complete assigned tasks.
- Provide, maintain, and improve a park and program infrastructure that provides opportunities for individual, family, and group benefits.
- Partner with community businesses, organizations, and government agencies to support and cultivate parks and recreation opportunities.
- Provide a consistent evaluation process for park visitors, program participants, and staff that provides for continuous improvement.

<p><u>COG/Agency Professional Staff</u> 20 full-time positions, 3 part-time positions</p> <ol style="list-style-type: none"> 1. Director 2. Recreation Services Manager 3. Recreation Supervisor 4. Sports Supervisor 5. Aquatics Supervisor 6. Nature Center Supervisor 7. Nature Center Program Coordinator 8. PT Nature Center Staff Assistant 9. Active Adult Center Supervisor 10. Active Adult Center Staff Assistant 11. PT Active Adult Center Staff Assistant 12. Parks Supervisor 13. Assistant Parks Supervisor 14. Parks Caretaker III/Mechanic 15. - 19. Park Caretakers I and II (5 positions) 20. Parks Staff Assistant 21. Office Manager 22. FT Staff Assistant – Main Office 23. PT Staff Assistant – Main Office 	<p><u>Authority Seasonal Staff (PT and FT):</u></p> <ul style="list-style-type: none"> ● Program Leaders/Day Camp Leaders ● Parks Maintenance Seasonal Staff ● Sports Officials ● Concessions Staff ● Tournament Staff ● Pools Staff (about 150 individuals)
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For 50 years, the Centre Region Parks and Recreation Agency staff members have remained focused on five objectives:

- Plan, implement, and promote a diverse menu of year-round programs, sport leagues, and special events.
- Promote and accommodate self-directed uses of parks/facilities by individuals, families, and groups.
- Provide efficient parks maintenance and operation services across an extensive range of recreation facilities at a reasonable cost.
- Strive to improve community parks and advance the approved capital projects at municipal and regional facilities.
- Coordinate and administer effective support for all of agency operations.

The Agency staff members manage and maintain just under 1,000 acres of Authority-owned, Authority-leased, and municipal-owned park land. The Agency operates two community pool facilities, the Millbrook Marsh Nature Center, the Centre Region Active Adult Center (in cooperation with Centre County Office of Aging), and two Regional Parks with a third to come in the next two-three years.

Owner / Lessee	Acres Maintained by Agency	Acres Maintained by the Municipality	Total Acres	Responsibility for Capital & Capital Repair Costs:
State College Borough	115	0	115	Host Municipality
College Township	129.9	81.1	211	Host Municipality
Harris Township	68.4	0	68.4	Host Municipality
Ferguson Township	178	80*	258	Host Municipality
Patton Township	164.9	111.8**	276.7	Host Municipality
Authority/COG	267.2***	0	267.2	The Modified COG Formula
TOTAL	923.4 acres	272.9 acres	1,196.3 acres	

*Former municipal authority land preserved for watershed protection; not considered parkland, but protected open space.

**Patton Woods Natural Recreation Area is considered passive parkland (62.7 acres).

***Whitehall Road Regional Park will not come online until 2020-2021 (100 acres).

The facilities assigned for Agency operations have expanded over the years (as shown below):

- 1992: 272 acres at 33 sites
- 2000: 452 acres at 38 sites
- 2006: 670 acres at 49 sites
- 2016: 920 acres at 55 sites
- 2017: 923.4 acres at 56 sites

In 2018-2019, four acres of the 42-acre Grays Woods Park will come online in Patton Township; CRPR will be providing maintenance and management of this park.

In 2018-2019, the nine-acre Songbird Sanctuary (formerly Owens Drive Park) in Ferguson Township will come online as a natural, open space area. CRPR will not maintain this facility, but it will be added to acres maintained by the municipality.

In the next three-five years, the 10.71-acre Tussey Pond Park in Harris Township will come online as a passive use park; the final timeline is still to be determined. CRPR will be providing maintenance and management of this park.

The Agency currently manages and maintains 56 sites (923.4 acres across five municipalities), to host both community and Agency programs, including:

- 45 municipal parks with 29 rentable park pavilions
- 34 sports fields utilized by the Agency and by Centre Region sports groups
- Three elementary school sports field sites (8.5 acres leased)
- 20 tennis courts operated at 10 municipal parks
- Three regional park sites [Hess Softball Complex, Oak Hall Regional Park, Whitehall Road Regional Park-leased] (189 acres)
- William Welch (land is leased from School District) and Park Forest Community Swimming Pools (7.5 acres)

- Millbrook Marsh Nature Center (62 acres leased)
- Centre Region Active Adult Center at the Nittany Mall (leased)
- Administrative offices in the COG Building (rent is charged to Agency)
- Centralized park maintenance building (leased)

D. CENTRE REGION PARKS AND RECREATION AUTHORITY (Authority)

The Authority was originally incorporated as the Centre Region Recreation Authority (CRRRA) on January 21, 1970 under the Pennsylvania Municipal Authorities Act of 1945. The incorporating municipalities were State College Borough and College, Ferguson, Halfmoon, Harris and Patton Townships. Each of the five townships appointed one representative to the Authority. State College Borough has two appointees. By tradition one of the Borough's representatives is nominated by the State College Area School District and appointed to the Authority by Borough Council. Although Halfmoon Township withdrew from the Centre Region Parks and Recreation Agency in 1981, it remains a member of the Authority but does not have a representative seated on the Authority to vote, nor does it contribute financially.

The Authority is recognized by the IRS as a 509(a)1 government non-profit which allows the group to apply for grants and donations that are not normally accessible by traditional governments. Additionally, the Authority holds a certificate from the Pennsylvania Bureau of Charitable Giving which allows the group to fundraise and receive donations.

The Authority was originally incorporated to fulfill two functions – to accept public donations and to borrow funds for pool projects. However in 2013 the role of the Authority was expanded to include the responsibilities of the Centre Region Parks and Recreation Board that disbanded in that year.

From 1928 to 1965 parks and recreation activities were provided by the State College Borough Recreation Board, consisting of five members. It was funded by the State College Area School District (SCASD) and the Recreation Director was a District employee.

In 1965 the State College Recreation Board was reorganized as the Centre Region Parks and Recreation Board. The new entity had seven members appointed for five year terms. Each municipality appointed a representative as well as the SCASD. In 1966 the new Board hired its first Parks and Recreation Director. Funding from the school district ceased but it continued to make its facilities available to the new regional agency. From 1966 to the present time, the majority of funding for the Centre Region Parks and Recreation Agency has been provided by the COG thorough contributions from the participating municipalities.

In 1974 the duties and organizational structure of the Centre Region Parks and Recreation Board were defined in Articles of Agreement adopted by an Ordinance of the

six Centre Region municipalities. In general terms the duties of the Board are to *“initiate such rules and regulations as it deems necessary to control and manage all the municipal parks and recreation facilities of the participating municipalities”* The 1974 Articles also reference employment responsibilities, equipment ownership arrangements, funding, and lines of reporting. All four of these practices are no longer current and are within the governance structure of the COG. By way of example, the 1974 Articles states that parks and recreation equipment are to be *“held in trusteeship by State College Borough.”* For at least the last twenty years, equipment is owned and titled to the COG. The 1974 Articles of Agreement should be updated and it is the desire of the Steering Committee that the consultant propose the governance structure that would provide the framework for the COG to consider their updates.

From 1970 through 2013, the members of the CRRA and Centre Region Parks and Recreation Board were the same individuals. As could be expected, having an Authority and a Board with the same members who are operating under outdated Articles of Agreement caused confusion. To clarify the situation the Board was disbanded in 2013 and its responsibilities transferred to the Authority which was subsequently renamed as the Centre Region Parks and Recreation Authority (Authority). In some ways, this action reduced confusion but in other ways it added to it.

E. MUNICIPAL PARKS AND RECREATIONS BOARDS/COMMITTEES

Four of the five Agency participating municipalities have a parks and recreation advisory committee or board whose members are appointed by the governing body of the municipality. In many cases the representatives to the Centre Region Parks and Recreation Authority are appointed from one of these local parks and recreation advisory committees, and provide great connections between the Authority, the Agency, and the municipality.

Typically, the local committees work directly with the elected officials and Borough/Township Managers to coordinate park equipment evaluations, assist with any park upgrades, consider greenway connections and recreational trails, and also provide input for the municipality’s parks, recreation, and open space plan or facility plan, and assist with land development decisions related to dedicated park land, greenway connections, and trail corridors.

College, Harris and Patton Townships have had Recreation Advisory Committees for many years. Ferguson Township just recently formed a Parks and Recreation Committee which held its first meeting in January, 2018. The Borough of State College does not have a parks and recreation committee, but the Agency Director and Parks Supervisor do keep in contact with the Borough Manager and Public Works Director.

Halfmoon Township is part of this comprehensive study but is not a participating member of the Agency; the township also has a parks and recreation committee.

III. SCOPE OF WORK

The purpose of the Parks and Recreation Regional Comprehensive Plan is to assess current conditions and provide implementable recommendations for parks and recreation in the Centre Region that reflect the desires of the residents for the future in terms of facilities, greenways/trails, programs, organizational structure, and governance. Specifically the Plan will:

- Provide the basis for updating the 2015-2020 Strategic Plan for the Agency, the 2018 to 2022 Capital Improvement Plan, and future COG budgets.
- Provide guidance to the Agency in managing and maintaining an increasing number of municipal parks and additional regional parks and facilities.
- Recognizing that the Centre Region is growing in terms of population and number of buildings as well as changing in terms of age, demographics, ethnicity, and interest in the types of recreations programs; provide recommendations for ensuring that parks and recreation services meet the expectations of the residents in an accessible, cost-effective manner that is on the cutting edge of profession.
- Offer recommendations for re-organizing the governance structure for the Agency in a manner that clearly defines the roles and relationships among the Centre Region Parks and Recreation Authority, Centre Region Council of Governments' General Forum, Centre Region Parks and Recreation staff, Centre Region COG staff, the municipalities, and related citizen advisory boards/committees.

The Steering Committee has established the following primary work tasks for the preparation of a Parks and Recreation Regional Comprehensive Plan.

Work Task A: Review General Information and Centre Region Background

Outcome: In this work task the consultant will review and identify information gaps in demographic, socio-economic, and physical resource data compiled and provided by the Centre Regional Planning Agency (CRPA), using the most recent U.S. Census data. The information that will be provided to the Consultant for review includes:

1. Centre Region Background:
 - a. Description of each Centre Region municipality*
 - b. Centre Region character, setting, history, and geographic location*
 - c. The Centre Region Comprehensive Plan*
 - d. The Centre Region Bike Plan to include trail connectors*
 - e. The Countywide Greenways Plan to include greenway connectors*
 - f. Centre Region Transportation Plan*
 - g. The Centre Region Act 537 Sewage Facilities Plan*
 - h. The Centre Region Regional Growth Boundary*

- i. Park locations and acreage that Agency manages and maintains**
- j. History of the Agency and current governmental structure**
- k. Relationships important to Agency programs especially for indoor facility use and community partners that assist the Agency in providing program space, instructors, or economic relationships**

*Provided by the CRPA

**Provided by the Agency

2. Socio-economic Features:

- a. Analyze socio-economic trends by comparing past U.S. Census information with the most recent U.S. Census data on these features: age, minority groups, education, gender, and per capita income*
- b. Provide population projections for at least the next 10 years*
- c. Briefly describe the major employers, economic conditions, and fiscal health of the Centre Region**

*Provided by the CRPA

**A source of this information for the Consultant may be the Centre County Chamber of Business and Industry (CBICC)

3. Physical Data*:

- a. The CRPA staff will provide the consultant with the current **six zoning and official land use maps**.
- b. The CRPA staff will provide the Consultant with the local topographic information and description of the following natural, cultural, and man-made features:
 - Water resources – flood plains, wetlands, waterways, **aquifers and well heads (one is in park)**, watershed maps, and stream corridors and buffer areas.
 - Significant historic and cultural sites.
 - Unique natural areas, woodlands, current and possible future greenways, and geological features.
 - Steep slopes (15% or greater).
 - Man-made corridors (on- and off-street bike trails, abandoned rail lines, utility right-of-ways, current and possible future trail connections).
 - State Parks and Forests and Game Lands and the related access points.
 - Publicly accessible open spaces that have an attached conservation easement.
 - Any other identified greenways and bike/pedestrian paths and potential connectors

*Provided by the CRPA

At a minimum, provide one comprehensive map that identifies the physical data noted.

Note: A bike path map of the Centre Region is available through the Centre Region Planning Agency a department of the Centre Region COG.

Note: The major stream corridor in the Centre Region is Spring Creek and its tributaries. This stream is classified as a high-quality cold water fishery by the Pennsylvania Department of Environmental Protection.

Note: On November 16, 2016, the League of American Bicyclists (LAB) renewed the State College - Centre Region area's designation as a Bronze-Level Bicycle Friendly CommunitySM (BFCSM). The designation is valid for four years and will be due for renewal in the summer of 2020.

Note: A comprehensive park map is available through the Agency's website, which includes address, amenities, and photos [www.crpr.org]

Specific Work Tasks for this study component include:

1. Based on the information provided by the Agency or requested by the consultant, prepare the community description materials for the plan in a manner that is acceptable to the Steering Committee and the Pennsylvania Department of Conservation and Natural Resources.
2. Prepare a vision for how the Centre Region is likely to change (population, type and direction of development, demographics, economy, transportation, etc.) within the next five, ten, and fifteen year periods and how those changes will impact Centre Region Parks and Recreation.

Work Task B: Review Agency General Information

Outcome: In this work task the consultant will review and identify information gaps in background, organizational structure, and governance structure of the Agency. The Agency will provide the Consultant with the following information:

- The relationships involving the six Centre Region municipalities, Centre Region COG and Centre Region Parks and Recreation Authority. Many of these relationships are documented through the following documents:
 - ✓ Centre Region COG Articles of Agreement (2008)
 - ✓ Centre Regional Parks and Recreation Board (1974)
 - ✓ Articles of Incorporation Centre Regional Recreation Authority (1970)
 - ✓ Planning, Development and Operation of Regional Parks Articles of Agreement (2006)
 - ✓ Ownership of Oak Hall Regional Park (2005)

- ✓ Ownership of Whitehall Road Regional Parklands Articles of Agreement (2006)
 - ✓ Ownership of Hess Softball Field Complex (2010)
 - ✓ Senior Citizens Center/Centre Regional Recreation Authority Articles of Agreement (1986)
 - ✓ Lease Agreement for Whitehall Road Regional Parklands among COG/Ferguson Township/and Centre Regional Recreation Authority
 - ✓ Lease Agreement for John Hess Softball Field Complex between COG and Centre Regional Recreation Authority
 - ✓ Lease Agreement for Millbrook Marsh (1997 extended in 2006 for 35 years)
 - ✓ Lease Agreement with SCASD for Welch Pool land (2007)
 - ✓ Lease Agreement for Oak Hall Regional Parklands (2011)
 - ✓ Pennsylvania Municipal Authorities Act
- The Agency's history and the evolution of its programs and facilities.
 - The Agency's 2018 Detailed Budget, 2018 Summary Budget and 2018 Program Plan. Budgets of other years will be available to the consultant, as requested.
 - The relationships that are important to the Agency will be documented and provided to the consultant. These relationships include but are not limited to the State College Area School District (SCASD), Centre County Government, and The Pennsylvania State University. The relationship with the SCASD is especially important as the Agency does not own/lease any indoor facilities at this time except for the Active Adult Center and the buildings at the Millbrook Marsh Nature Center.

Specific Work Tasks for this study component include:

1. The consultant is to review the aforementioned documents and decide how best to summarize them in the plan as to best describe the long history, differing agreements, and multiple stakeholders involved in the Agency.
2. The consultant should define the best practices for the Authority based on the PA Authority Act and in relationship to any advisory capacity.

Work Task C: Review and Update Agency Mission Statement and Goals

Outcome: After reviewing the Agency Background Information and Work Task B, the consultant will review and make recommendations regarding the Agency mission statement, vision statement, and Strategic Plan. The goal is to assure that the mission and vision statements and Strategic Plan are clear, concise, and forward-thinking in terms of offering a five, ten, and fifteen year attainable vision of the future of Parks and Recreation in the Centre Region.

Specific Work Tasks for this study component include:

1. Develop a “refreshed” draft mission statement, vision statement, guiding principles, and Strategic Plan. (developing general objectives is optional) The mission and vision statements and goals should be re-evaluated toward the end of the planning process to ensure that they are still appropriate for the Agency. By way of example, it is believed the Strategic Plan can be strengthened in the area of promoting accessibility to programs and facilities.

If agreeable to the consultant, this work task may be assigned to the Authority and Agency Staff during the planning process with the resulting documents reviewed by the consultant.

Work Task D: Public Participation

Outcome: Public participation is a high-priority work task for the Steering Committee. The committee desires to have the public involved in the development of this plan. The consultant team is asked to use a variety of tools to determine the extent constituents are currently using available services, which services they feel need to be increased or added, and what they want in the future regarding facilities, open space, trails, greenway and bike trail connectors, etc. At a minimum the Steering Committee asks the consultant to solicit public comments using the following tools –randomized survey, key person interviews, two regional public meetings, social media apps, and a web-page link to the survey questionnaire for individuals who did not receive a survey questionnaire but desire to provide comments to it.

Specific Work Tasks for this study component include:

1. A statistically-valid, randomized survey of Centre Region residents is to be included in this study. The consultant should provide a price quote for this survey work; however, the Steering Committee may opt to work with The Pennsylvania State University (PSU) to conduct the field work for the randomized survey and provide the results to the consultant for analyzing. The consultant and PSU will have the option of working together to determine what data will be collected in advance so that the results meet the data needs of the consultant for identifying and analyzing how the residents view the current parks and recreation programs and its facilities and their ideas for the future.
2. Hold two regional public meetings to gather information about views of Centre Region residents regarding the current parks and recreation program and its facilities and ideas for the future. The Agency staff will assist the consultant with the logics for these meetings such as identifying a meeting location, providing public notice using print and electronic media, keeping notes etc. It is suggested to hold the first

- meeting as a project kick-off and as a pre-test, and to hold the second meeting post survey data collection or a post-test.
3. The consultant is to provide the Executive Director with the results of this survey for distribution to the managers of the participating municipalities.
 4. The goal of the survey and specific questions should meet the needs of Centre Region residents to express their ideals regarding recreational opportunities, programs and fees, the number of parks and amenities within them, accessibility to programs, parks, and equipment, passive vs. active park use, sustainable practices, trail connectors and greenway corridors, and the ability for natural conservation with passive use parks.
 5. Conduct key person interviews of Centre Region sports groups leaders, municipal managers, environmental groups, and the Centre Region Bicycle Coalition and other individuals that may be identified by the Steering Committee.
 6. Working with Agency staff establish a link on the website to give residents the opportunity to provide comments. The questions on the website should be similar to those asked in the randomized survey (Work Task 1)
 7. Summarize the results of the public participation process in the plan.
 8. The Agency staff maintains a Facebook page and other social media accounts. The Consultant is to work with staff to inform the public about the study and identify ways that comments can be provided.
 9. The Consultant should provide suggested methods on other ways to engage the public in the study process that are not previously mentioned.

Work Task E: Governance Structure

Outcome: In this work task the Consultant will analyze, evaluate, and prepare a recommendation for a governance structure for the regional parks and recreation program provided by the Centre Region COG. In addition, this component is to evaluate and prepare recommendations on the various stakeholder groups involved in making policy level decisions relating to parks and recreation facilities:

Specific work tasks include:

1. Review, evaluate and propose recommendations on:
 - a. The 2008 Articles of Agreement for the Centre Region Council of Government, the 1974 Articles of Agreement for Centre Region Parks and Recreation, 1970 Articles of Incorporation for the Centre Region Parks and Recreation Authority, Articles of Agreement relating to the ownership of regional park facilities as well as their planning, development and operation, and the Authority's Bylaws.
 - b. The relationship between the COG and the Centre Region Parks and Recreation Authority. In the past the lines of responsibility between these two groups as they related to capital development and funding have not always been clear

particularly relating to the regional parks, Active Adult Center and Millbrook Marsh Nature Center.

- c. The relationship between the municipal parks and recreation advisory committees, the Agency, and the Authority.
 - d. The relationship between the Authority and the COG General Forum. The General Forum is the 32 member governing body of the Centre Region COG. It consists of all the elected Board/Council member of the six municipalities that are members of the COG.
 - e. The relationship between Penn State University and the Millbrook Marsh Nature Center and the existing land leases. At the time of the RFP being drafted discussions are occurring among the University, Authority, and COG for changing the terms of the lease particularly its terms and the disposition of improvements to the Center that have been funded by the COG or the Authority/
 - f. SCASD/Agency cooperative efforts and shared use of space; evaluate the current agreement that names the Agency as a priority B user of school space and the times when that agreement is not followed.
 - g. Cooperative efforts with other recreation providers, support groups, area businesses etc.
2. The consultant should benchmark the governance structure against other similar regional agencies in order to make recommendations on the current structure such as streamlining relationships and processes.
 3. Discuss any existing governance problems, which will be examined more thoroughly as part of this planning effort.
 4. Propose a governance model that is most likely to be responsive to the changing needs of a growing and changing community, is financially accountable to General Forum, is transparent and accessible to the public, provides for efficient decision-making both at a regional and municipal levels and promotes innovative thinking and protects the environment.
 5. Identify, evaluate, and propose recommendations on the communications among the Agency staff, COG Administration, the Authority, the COG General Forum and its committees, the municipal governing bodies, and the municipal park and recreation advisory committees, etc.
 6. Identify, evaluate, and propose recommendations on the process and criteria for acquiring regional parkland.

Work Task F: Agency Personnel

Outcome: In this work task the consultant will describe who is responsible for providing the Agency's recreation and park services and analyze the effectiveness of each involved entity. In the Centre Region there are multiple groups involved in policy making and budgeting including but not limited to the Centre Region COG, the Centre Region Parks

and Recreation Authority, and the governing bodies and advisory committees of the five participating municipalities. Halfmoon Township operates its own Parks and Recreation program and employs a part-time seasonal employee.

Organizationally Agency Staff are classified by the Internal Revenue Service as follows:

- Centre Region COG employees: All full-time staff, three part-time staff, programming division, and seasonal maintenance staff
- Centre Region Parks and Recreation employees: All part-time staff and seasonal staff at the two regional pools and at the Millbrook Marsh Nature Center

Regardless of IRS designation, all Agency employees follow the COG Personnel Policies and Pay Schedule. The Parks and Recreation Director is a direct report to the COG Executive Director. The consultant will be provided with the COG and Agency organizational charts.

1. Review, evaluate and prepare recommendations on the current Agency organization chart and analyze if it reflects present conditions.
2. Provide the following:
 - a. A breakdown of the number and type of personnel involved with providing recreation and park services, programs, and maintenance.
 - b. Existing job descriptions and a summary of the roles and responsibilities of involved personnel.
 - c. The numbers and descriptions of involved volunteers such as those serving on a recreation and park board or arts councils, maintaining parks, assisting with programs etc.
3. Detail, evaluate, and prepare recommendations on the following:
 - a. How new staff/volunteers are hired/appointed and trained for their new positions.
 - b. Existing personnel policies including any manuals, appraisal systems, opportunities to attend educational conferences and workshops etc.
 - c. The level of staffing (paid or volunteer) needed to effectively administer, manage, and maintain the agency's and Authority's facilities, programs, and services, and manage and maintain the municipal-owned park acreage and compare with existing conditions.

Work Task G: Facility and Open Space Inventory and Analysis

Outcome: In this work task the consultant will identify existing recreation and park resources, regardless of ownership, and inventory and analyze them compared to standards based on population, service areas, the Department of Conservations and

Natural Resources' PA State Outdoors Recreation Plan, or other guidelines. The consultant should also benchmark against any Pennsylvania Recreation and Park Society or National Recreation and Parks Association data. When combined with Centre Region input, this identifies the general locations where new parks and open space areas are needed, where trail connections can be made, the type of facilities that should be developed in these areas, and which facilities should be renovated first. This inventory should also include maps and other information provided by the CRPA identifying existing and proposed greenways and bicycle/pedestrian paths and future connections, and protected riparian buffer areas. Most of the municipalities have adopted ordinances protecting riparian areas along Spring Creek and its tributaries.

The specific work tasks for this study component are identified below. The consultant is to organize and present this information by municipality and/or neighborhoods with population and service areas. Some of this information and related maps should be available through individual municipalities, the county GIS system, or the CRPA.

1. Provide, on a map broken down by municipality, the location of indoor and outdoor facilities and open space owned/operated by:
 - a. The municipality and/or the Agency
 - b. State College Area School District properties
 - c. Private schools
 - d. Major non-profits and quasi-public organizations (athletic associations, scouts, conservancies, service clubs, YMCA, Churches with recreation facilities
 - e. Penn State University recreation facilities
 - f. Pennsylvania State Forests
 - g. Pennsylvania game lands
 - h. Pennsylvania State Parks
 - i. Third party private businesses (The Makery, Community Church of Christ (C3), health clubs, bowling alleys, etc.) It is to be noted if these are open to the public, require membership, are free, or pay-to-play based
 - j. Identify natural service areas, pocket parks, protected areas, and historical properties
2. For all public (including schools) and non-profit facilities identified on the above map, list in accompanying charts:
 - a. Facility or open space name
 - b. Ownership
 - c. Number and type of facilities
 - d. Acreage
 - e. General condition and use

3. For facilities and open space areas owned or managed by the Agency, list and analyze the following:
 - a. Facilities that are in poor condition and, generally, the major repairs or additions that are needed.
 - b. The extent to which playgrounds meet current safety guidelines such as those developed by the Consumer Product Safety Commission and NRPA's Playground Safety Program.
 - c. The extent to which facilities comply with the Americans with Disabilities Act.
 - d. Facilities that have become obsolete or are no longer appropriate for surrounding residents.
 - e. The ability of residents to drive, bike, or walk to existing facilities.
 - f. Opportunities to enhance environmental, social and economic sustainability, by way of example for environmental sustainability the consultant should provide recommendations for reducing energy consumption or producing energy on-site, minimizing the use of chemical applications, and expanding the use of planting materials that are native to Pennsylvania and which also provide ground cover, pollinator plants, and work well in rain gardens. For this study social sustainability means that parks and related facilities have design qualities that encourage a growing and thriving community. The park should connect people within the Centre Region and cause a fostering of new relationships in addition to providing recreational activities for the residents.
4. Propose a system for categorizing and describing the various type of park facilities maintained by the Agency and those maintained by the municipalities. The consultant should be advised that a park classification system has been attempted several times and was not brought to conclusion. By way of example the types of parks may include:
 - Regional Parks owned/managed by the Authority (Oak Hall, Whitehall Road and Hess Softball Complex)
 - Municipal parks maintained by the Agency
 - Municipal parks not maintained by the Agency
 - Regional Special Destination Recreation Facilities maintained by the Agency (pools, Active Adult Center, Millbrook Marsh Nature Center)
 - Pocket Parks
 - Neighborhood Parks
 - Community Parks
 - Special situation parks (for example, Fogelman Field that is owned by the SCASD but maintained by the Agency)
5. For open spaces, evaluate whether existing open spaces should be reforested or developed into meadows, butterfly gardens, rain gardens, pollinator gardens, etc.

Much of the land the Agency currently maintains is owned by the municipalities and much of it is mowed grass (not sports fields) and the question has been raised whether some of this land should be returned to a more natural state for passive enjoyment and environmental benefit.

6. Provide a recommendation on the responsibility for maintaining facilities and equipment at municipal parks. Currently, some facilities and equipment are maintained, repaired and replaced by the Agency while others are the responsibility of the participating municipalities. The assignment of responsibilities is a long-term “gray” area and determined by capital improvement thresholds. The Agency, the municipalities, and the consultant are asked to take an objective view of how these duties are currently handled and what should be the arrangement going forward.
7. Compare by municipality and for the Centre Region as a whole the existing numbers and types of facilities with developed standards either from the National Recreation and Park Association or a county agency.
8. Compare received public input with existing facilities and conditions.
9. Discuss and analyze open space preservation techniques such as mandatory dedication, overlay zoning, an official map, conservation easements, etc.
10. Using the Centre Region bike path map provide recommendations on the future maintenance responsibilities for bike paths and the high priority connection links that should be made in the future to enhance access to recreation facilities including local, regional, and state facilities. The Centre Region Planning Agency is an excellent source of information for this work task.
11. Using trail and greenway inventories, analyze the current data to determine future trail connections or possible new greenways for the region.

Work Task H: Evaluate Facilities and Equipment Maintenance

Outcome: In this work task the consultant will evaluate the effectiveness of the Agency maintenance of grounds and facilities and prepare recommendations for improvement where needed. The consultant will be provided with the 2018-2022 Capital Improvement Plan, a listing of equipment that includes date of purchase, cost, and maintenance records.

Specific work tasks are:

1. Review and evaluate the formal and informal arrangements and understandings relating to the responsibility for repairing and/or funding the repairing of pavilions, playground equipment, restrooms, paved surfaces etc. at municipal and regional park facilities. In the past the lines between municipal and agency responsibilities have not always been clear.
2. Assess and prepare recommendations on relationships and adequacy of communication between the Agency’s Maintenance Department and the Municipal

- Public Works Departments relating to the installation of new equipment, major maintenance projects and set up/take down for special events.
3. Detail, evaluate, and prepare recommendations on the current maintenance program (record keeping, inventory maintenance, preventative maintenance, use of a maintenance management plan, acreage vs. staffing levels, etc.).
 4. Detail, evaluate, and prepare recommendations on the current methods of tracking costs for park and facility maintenance.
 5. List the major maintenance equipment including age and purpose.
 6. Describe the Agency's existing risk management efforts including inspection of park facilities, particularly playground equipment.
 7. Analyze the adequacy of maintenance in relation to the condition of the recreation and park facilities and open space areas.
 8. Detail, evaluate, and prepare recommendations on the scope of the Agency's maintenance services and propose whether some of these services should be outsourced to third party vendors (by way of illustration field lining, mowing, tree trimming etc.).
 9. Review the safety inspection procedures and safety inspection records for park equipment and identify and deficiencies and/or opportunities for improvement.
 10. Review the Agency's practices for tracking and recovering maintenance costs (when possible) at municipal and regional parks. There are two major components to this work task:
 - Review the practices for recovering costs at regional parks that host tournament events should be assessed to ensure the additional costs (for example field lining, mowing, staffing and trash/recycling removal) for preparing these fields and cleaning up afterward are covered by the scheduling fee.
 - Review the current and proposed practices for tracking maintenance costs at the municipal and regional park facilities and identify if there are options to provide more detailed information without great expense.

Work Task I: Agency Administration

Outcome: In this work task the consultant will evaluate and make recommendation relating to the effectiveness of the Agency's Administration.

Specific work tasks are:

1. Benchmark the Agency's staffing level, internal organizational structure, job titles, and work assignments to other similar parks and recreation agencies or statewide and/or national standards, and identify strengths and areas for improvement.
2. Identify, evaluate, and propose recommendations to institutionalize long-term planning efforts for the Agency as to ensure that the Agency remains on the cutting

- edge of changes in the profession and is meeting or exceeding the expectations of the residents.
3. Identify, evaluate, and propose recommendations on the Agency's ability to work cooperatively with other public agencies, environmental groups, sports organizations, community groups, and businesses.
 4. Identify, evaluate, and propose recommendations on the effectiveness of existing office procedures and policies.
 5. Discuss any existing administrative problems, which will be examined more thoroughly as part of this planning effort.
 6. Evaluate public relations and marketing efforts to promote agency functions, services, and programs Policies and procedures that govern the general operation of the agency's recreation and park functions (use of facilities, non-resident participation, policy manuals, risk management program, record keeping etc.)
 7. Opportunities for the public to get involved with planning efforts. Involvement could include the agency's use of program evaluation forms, distribution of surveys, public meetings etc.
 8. Record keeping procedures.

Work Task J: Evaluate Recreation Programs

Outcome: In this work task the consultant will evaluate the Agency's existing programs, camps, and special events, classes, sports leagues, and offer recommendations for improvement. In addition, the consultant, based on the comments received through the public participation process, is to identify future programming opportunities. The intent is the Agency programming to be forward-looking and responsive to the desires and interest of the residents of all ages. The Agency will provide the consultant with copies of its Active Guide for the last two years.

The specific work tasks for this study component are:

1. Conduct research with the intent of benchmarking the Agency's programs, camps, leagues and special events against best practices. For instance, new programming trends that are appropriate for implementation in the Centre Region should be identified.
2. Provide a list of programs sponsored by the area's public, non-profit, and private entities that includes (see G-1a for type of entities)
 - a. Sponsoring group
 - b. Program name
 - c. Target age and gender of participants
 - d. Program fee, if any (revenue/expense ratio)
3. For agency or publicly-sponsored programs, provide information on participation trends for the last five years.

4. Analyze if there is a comprehensive offering of programs in the Centre Region that include these type of activities: active and passive; competitive and non-competitive; ones for individuals and groups, both sexes, and all ages and abilities; and a variety of social, physical, and cultural experiences.
5. Identify program gaps in the Centre Region and how the Agency could address these opportunities.
6. Analyze the Agency's compliance with the Americans with Disabilities Act with respect to accessibility to programs and services.
7. Identify recreation programming offered by non-profit or private entities.
8. Identify new programming areas for Agency's and discuss how to begin developing them.
9. Assess whether the Agency's policies and procedures, particularly youth protection, guard the safety of program participants and are consistent with applicable state and federal laws.

Work Task K: Evaluate Financing of Parks and Recreation

Outcome: In this work task the consultant is to identify and analyze the Agency funding levels and sources, including funds received through the Centre Region COG and Centre County Government, user fees (pool passes, program and camp registrations, class fees etc.) and public donations. This analysis is to benchmark the funding of the Agency against the revenue sources of other municipal departments as well as other agencies of similar size, and any state or national standards. Specific financial data will be assessable through the COG Finance Director as requested by the consultant.

Specific items to be addressed in this section include:

1. Describe the Agency's philosophy toward providing tax support for financing recreation and park services.
2. Benchmark Agency expenditures, both operating and capital, with agencies and municipalities that have similar populations and socio-economic characteristics.
3. Provide a breakdown of the major sources and amounts of revenues including municipal taxes, fees and charges, donations, grants, etc. and analyze the Agency's use of a variety of financial resources.
4. Describe and analyze the current recreation and park budget process.
5. Evaluate the setting of resident and non-resident fees for registering for recreation programs and purchasing pool passes with the intent of ensuring the COG's costs are being recovered.
6. Identify and discuss various sources of funding such as fees and charges, foundations, grants, donations, mandatory dedication, etc. and provide examples of their appropriate application.

7. Propose new or enhanced funding sources for the purpose of expanding the use of private dollars, expand or maintain facilities, ensure that recreation programs are affordable to as many residents as possible.
8. Detail, evaluate, and prepare recommendations on the Agency's community fundraising efforts for the regional parks, Active Adult Center, and Millbrook Marsh Nature Center.
9. Evaluate the current process for applying for grants via the Authority versus COG.
10. Evaluate the "affordability" of the Agency's camps, recreation programs, pools passes etc. relative to income levels in the Centre Region and identify specific areas of concern.
11. Offer recommendations to assist youth whose families may not have the income to afford enrolling the Agency's camps, recreation programs, and aquatic programs.

Work Task L: Propose Recommendations for the Future

Outcome: This component contains specific actions for each work task that the Agency should undertake to improve its services and better meet the needs of Centre Region residents. The consultant should support each work task recommendation with data compiled and evaluated during the project. In drafting this section, the consultant should recognize that the Centre Region has approximately \$200 million in new construction each year and grows by 7,000 to 10,000 residents each decade.

Specific works tasks are:

1. Detail the recommended changes for administration, personnel, maintenance, programs, and financing and provide supporting data to justify the recommendations.
2. Identify recreation facility needs for the next 10-15 years for the Centre Region and whether these needs are best addressed regionally, by individual municipality, private vendors or a newly formed entity.
3. Provide a cost estimate to implement each recommendation and discuss any potential implementation concerns or obstacles.
4. Propose a governance model that is most likely to be responsive to the changing needs of a growing and changing community, is financially accountable to General Forum, is transparent and accessible to the public, provides for efficient decision-making both at a regional and municipal levels and promotes innovative thinking and protects the environment.

Work Task M: Prepare Implementation Plan and Executive Summary

Outcome: There are two components to this work task: 1. the identification of the specific steps to follow for the plan's recommendations (as stated in Work Task J) to be implemented and 2. preparation of an Executive Summary that highlights the major findings of the study and the most significant recommendations of the plan.

The specific work tasks to be completed by the Consultant in preparing the Implementation Plan include:

1. Prioritize the operating-related recommendations included in “K”. (These should not include capital expenses.)
2. For each recommendation, identify the following:
 - a. Who is going to be responsible?
 - b. What is the targeted date for beginning implementation?
 - c. Potential costs.
 - d. Potential funding source(s).
3. For capital improvements, provided a prioritized, multi-year Capital Improvement Plan Program that is broken down by short-term (1-3 years), medium-term (4-7 years), and long-term (8 plus years) projects and includes the following information for each project:
 - a. Facility/area name.
 - b. General description of proposed improvements.
 - c. The total estimated development costs of proposed improvements. The cost estimate should include engineering and design costs, project administration costs, acquisition and/or construction costs and at least a 10% contingency.
 - d. The proposed financing source(s) for each improvement.
4. For operating-related costs associated with the administration, personnel, programming and maintenance components, provide a five-year summary of projected fiscal implications on the operating budget.

The Executive Summary is to provide a summary of the plan’s highest priority findings and recommendations. The Summary is to be included in the beginning of the plan document.

III. PREPARATION OF DRAFT AND FINAL PLAN DOCUMENTS

1. Draft Plan Submitted to Steering Committee and Pennsylvania Department of Conservation and Natural Resources (DCNR).

Outcome: Prior to May 7, 2019 the consultant is to provide a draft plan to the Centre Region COG for review by the Steering Committee and the Pennsylvania Department of Conservation and Natural Resources (DCNR). As a condition for receiving a DCNR grant to partially fund this project the draft plan must be reviewed by DCNR. DCNR must review and approve the complete draft plan before it is officially adopted by the agency. Typically, the review process consists of reviewing a complete draft plan, providing comments and then reviewing a revised draft to ensure comments are adequately

addressed. Accordingly, the consultant must provide DCNR with an electronic copy of the draft plan.

2. Draft Plan Submitted to the Pennsylvania Department of Conservation and Natural Resources (DCNR).

The Steering Committee will review comments from DCNR at the June 4, 2019 Steering Committee meeting and forward all comments to the firm for revisions for the final plan.

3. Final Plan Submitted to Steering Committee

Outcome: A high quality final plan document is prepared and submitted to the agency and to the DCNR on or before July 2, 2019. The final product must be a bound document, beginning with an executive summary and followed by clearly labeled sections for each of the plan's components. All supporting documents and information shall be included in appendices and not in the body of the report. The DCNR recommends that 25 copies of the narrative report and summary documents, appropriate mapping, etc. be provided to the municipality/owner(s). The exact number of copies must be stated in the Request for Proposal and should be determined based on the grantee's needs. Three written bound copies and one electronic version of the final report must be submitted to DCNR.

A Regional Comprehensive Plan is an official document that, in part, dictates municipal policy and decisions regarding land use. For that reason, the DCNR encourages municipalities to follow adoption procedures listed in the Pennsylvania Municipalities Planning Code, section 302, "Adoption of the Comprehensive Plan". These procedures require a formal public hearing as part of the plan adoption process with a 45 day review period. A copy of the plan must be sent to all adjacent municipalities and the school district. The DCNR provides specific details to the grantee later in the project.

Depending on the agreed-upon scope of work, other final products can include a separate, promotional summary document; conceptual master site plans and drawings; sample implementation ordinances; display maps; etc. All supporting documents and information shall be included in appendices and not in the body of the report. The DCNR recommends that 25 copies of the narrative report and summary documents, appropriate mapping, etc. be provided to the municipality/owner(s).

4. Final Plan Presented to General Forum

Following the review by the Steering Committee, the consultant is to present the final Parks and Recreation Regional Comprehensive Plan to the General Forum of the Centre Region COG during a regular meeting. Typically General Forum meetings begin at 7:00pm

the fourth Monday of the month and are held at the COG Building, 2643 Gateway Drive, State College.

IV. GENERAL INSTRUCTIONS

A. Deadline - The deadline for submission of proposals is **11:00 AM prevailing time on Tuesday, August 7, 2018**. Proposals shall be publically opened on that same day at 12:00 PM prevailing time in the General Forum Room at the Centre Region Council of Governments Building, 2643 Gateway Drive, State College, Pennsylvania. The contract will be awarded after interviews and final approval by the Centre Region COG General Forum, at a public meeting tentatively scheduled for October 29, 2018.

B. Copies - The COG requires twelve printed copies of the Consultant's proposal. All requested materials will be sealed in an envelope or other appropriate sealed packaging and clearly marked "Proposal for Parks and Recreation Comprehensive Plan" and addressed to:

Jim Steff, Executive Director
Centre Region Council of Governments
2643 Gateway Drive, Suite 3
State College, Pennsylvania 16801

C. Cover Letter – A maximum two-page cover letter should be submitted that provides a summary of your proposal and explains why your firm should be selected.

D. Length of Validity – The proposal and cost schedule shall be valid and binding for **90** days following proposal due date and will become part of the contract that is negotiated with the COG.

E. Vendor Information – Vendor information including company name, address, telephone number, and name, title, address, e-mail address, and telephone number of contact who is authorized to bind company into contractual agreements and to whom correspondence should be directed needs to be included on your proposal. Proposals must be made in the official name of the firm or individual under which business is conducted (showing official business address) and must be signed by a person duly authorized to legally bind the person, partnership, company or corporation submitting the proposal. A corporation must indicate place and date of incorporation.

F. Consultant Experience – Describe your experience with at least three comprehensive plans for which your firm has provided similar services. Please provide the name and telephone number of references for each project listed. Experience should demonstrate how you have helped identify your client's vision

regarding the evaluation and future visioning of park and recreation programming, facilities and organizational structure and developed strategies directing your clients toward that vision. In addition, the firm's experience in engaging the public using a variety of tools should be clearly identified in the proposal. Municipal references are preferred. The COG reserves the right to contact references without prior notification.

- G. Methodology – Explain your firm's specific approach for completing the project, collecting and analyzing data, including but not limited to a detailed timeline for project completion with key milestones and benchmarks.
- H. Timeline – Include in your proposal a timeline (incorporating a November 5, 2018 start date) that details each major work element, target dates for public meetings, and dates for completion of draft and final documents.
- I. Project Manager & Team – Identify the individual you propose to assign as a Project Manager and all members of the project team. Include a statement of qualifications and/or resume for each member.
- J. Pricing Methodology – Provide an itemized price estimate, including number of hours, hourly rate of all named team members, and total cost. Any expenses that are to be included as part of your proposal must be listed as a separate line item and must include both the total anticipated expenses to be claimed and nature of the expenses (such as: supplies, lodging, etc.). Indicate the total project cost, including all reimbursable items (Section XIII). Hourly rates should be included for required time and materials for work not specified in the Scope of Work.

If awarded a contract, a proposer is bound by this price in performing the work. The contract price may not be exceeded unless the contract is amended to allow for additional costs.

If awarded a contract, the firm may not change the staffing assigned to the project without approval by the COG. However, approval will not be denied if the staff replacement is determined by COG to be of equal ability or experience to the predecessor.

- K. Additional Work Tasks – The Centre Region COG, through the Executive Director, may request that the Consultant perform tasks that are not included in the Scope of Work for this Request for Proposals. The Consultant is asked to indicate on the bid sheet the hourly rate for work performed outside the Scope of Works.

Examples of these tasks include:

- Customer service and more marketing related issues.
- Concept designs for new recreation facilities.
- Greenway plans that connect parks and open spaces.
- Specific playground safety issues
- Maintenance management plan.

- Options for adding or renovating recreation areas.
- L. Proposal Rejection – The Centre Region COG reserves the right to reject any or all proposals, or parts of proposals, or to waive any informality or irregularity as deemed in the best interest of the Centre Region COG.
- M. Requests for Information – During proposal preparation, requests for information (RFI) will only be accepted by electronic mail (e-mail) to the attention of, Jim Steff, Executive Director (jsteff@crcog.net), on or before **3:00 PM prevailing time on Friday, July 16, 2018**. Answers to all RFI’s will be e-mailed to all parties who request this RFP and supply a contact e-mail address.
- N. Interviews with the Steering Committee – Interested Consultants shall anticipate meeting with the Steering Committee to present their proposals, respond to questions, and to ask questions of the Committee. It is anticipated that 3 to 5 Consultants will be invited for interviews. All costs associated with this interview are the responsibility of the Consultant.
- O. Payment Schedule – Your method of billing must be stated. The preferred practice of the COG is to issue payments to the Consultant according to the following schedule. Please remember, this is a grant project in conjunction with the PA Department of Community and Natural Resources; grant funds are paid as reimbursables and the following schedule is proposed.
- 20% following execution of contract (**late September 2018**)
 - 50% following the presentation of the draft plan to the Steering Committee (**mid May 2019**)
 - 20% following the presentation of the final plan to the General Forum of the Centre Region COG (**late August 2019**)
 - Make final payment of 10% of the funds within 30 days after final product approval by the Department of Conservation and Natural Resources. (**late September 2019**)

V. STUDY PROCESS (TENTATIVE)

- June 5 Steering Committee finalizes draft RFP
- June 19 COG Executive Committee approves RFP for General Forum Agenda
- June 25 Draft RPF on General Forum Agenda for approval
- July 1 RFP Legal advertisement published on Sunday, July 1 in *Centre Daily Times* and posted on COG and CRPR websites
- July 16 RFP questions due to Jim Steff.
- July 23 Written responses to RFP questions will be sent to all firms.
- August 7 Proposals are opened at Steering Committee meeting.
- August 8-14 Steering Committee will score proposals.

- August 17-31 Steering Committee conducts interviews with selected firms.
- September 4 Steering Committee identifies a preferred firm.
- September 4-14 Negotiations commence with preferred firm.
- September 17 Required materials sent to DCNR for review of Steering Committee’s recommendation and firm’s qualifications
- October 16 COG Executive Committee approves Steering Committee’s recommendations for General Forum Agenda
- October 29 Steering Committee’s recommendations on General Forum Agenda for approval
- October 30 Notice to Proceed provided to selected firm.
- November 6 Project begins with a meeting between the selected firm and the Steering Committee
- May 7, 2019 Firm meets with Steering Committee to present draft plan and Steering Committee forwards plan to DCNR for review*
- June 4, 2019 Steering Committee receives comments from DCNR and submits to Firm for revisions
- July 2, 2019 Consultant sends Steering Committee final plan
- August 20, 2019 COG Executive Committee approves final plan for General Forum Agenda
- August 26, 2019 Consultant presents final plan to the General Forum*

** For all electronic versions – format of document: Microsoft Word (doc or docx) or Adobe Acrobat (pdf); Delivery method: USB or Google Docs.*

VI. CONSULTANT SELECTION/EVALUATION OF PROPOSALS

All proposals will be rated on the criteria below by the project Steering Committee, based on responses provided in accordance with Section IV (“General Instructions”). Each proposal may be awarded a maximum of one hundred (100) points across all criteria. Points assigned by each member of the Steering Committee, on each criterion, for each individual proposal will be added to produce the total points awarded by that member for that proposal; the total points awarded for an individual proposal by all members of the Steering Committee will be averaged to produce a final score for that proposal.

The Centre Region COG reserves the right to select a firm directly following review of all proposals, or to enter into competitive negotiation with two (2) or more qualified respondents whose proposals are determined to be in the competitive range, based upon the evaluation results. If negotiations are conducted, all selected respondents shall be notified in writing of subsequent steps in the selection process.

Following evaluation of proposals, a recommendation for contact award may be made by the project Steering Committee to the Executive Director, and subsequently the COG General Forum, which shall make a final determination on any award.

During the time that the consultant selection process is open, proposing firms may only contact those staff persons listed in this document. Any contact with staff or other decision makers outside those parameters without explicit permission, activities intended to circumvent the RFP process, or actions intended to give a firm an unfair advantage during the proposal process shall result in disqualification of the firm and their proposal.

The following criteria, listed in order of relative importance, will form the basis for selection of a consultant:

- a. Overall quality of the proposal, with particular attention paid to the technical merit of the proposed methodology and approach to meeting project work tasks. This will include responsiveness of the proposal in clearly reflecting an understanding of the services to be performed, appropriateness and adequacy of the proposed approach, the manner in which services will be delivered, and demonstrated and applicable techniques for collecting and analyzing data. Consideration will also be given to the professional, clear, and concise preparation of proposal documents submitted in accordance with the requirements listed in Section IV (“General Instructions”). **(50 points)**
- b. Qualifications and experience of the consultant team (including all consultants that may be involved in a joint proposal, as well as all individual team members) in working with complex parks, recreation, and open space planning processes; facilitating stakeholder involvement; and preparing technical plans within the subject area. **The proposal must specify the key personnel assigned to all aspects of the project, and the extent of their participation.** Particular attention will be paid to examples of previous projects completed by the consultant team and individual team members that are:
 - Similar in scope and complexity to this project; and
 - Based in similar areas in terms of geography, population, demographics, growth patterns, and recreational characteristics

This criterion includes relevant **public** sector experience of the firm, a review of the academic and employment profiles of the principals and staff of each firm to establish professional and technical competence, information derived from reference checks and reviews of previous projects and documents, and both written and oral presentation skills. **(35 points)**

- c) Proposed total elapsed time and schedule for project completion, delineated by any interim reports and major project tasks. This includes the reasonableness of time estimates and total hours, methods for managing the work flow to ensure timely and

orderly completion, and the value of the proposed schedule when considered relative to the first two criteria. **(10 points)**

- d) Proposed total cost to complete the project, delineated by major project tasks, including the value of the cost proposal when considered relative to the first three criteria. **(5 points)**

The Centre Region COG reserves the right to award a contract to the best qualified firm, regardless of cost.

Comprehensive recreation, open space, and greenway plans are typically developed by a team of professionals that include landscape architects, community planners, and recreation and park professionals. At least one member of the Consultant team must be a recreation and parks practitioner*, preferably holding a CPRP (Certified Parks and Recreation Professional) certification with a minimum of three (3) years of experience in the administration, planning, and development of facilities/areas, programming, finance, personnel, and maintenance of a comprehensive parks and recreation system or related entity.

*Generally, the practitioner's role is to educate the grantee on the variety of available recreation and park-related operating practices and to help select the most suitable ones. The practitioner's minimum role should include:

- Attending a majority of the study committee meetings.
- Involvement in and implementation of the public participation process (such as attending public meetings, conducting interviews, and reviewing the survey process).
- Participation in preparing and reviewing the plan text from draft chapters to the final plan. The Bureau requires written review comments from the practitioner.
- Visits to and evaluations of all existing sites and those considered for potential acquisition.

VII. DELIVERABLES

- A. The selected Consultant will participate in the required meetings listed in this RFP.
- B. The selected Consultant will provide for public participation in the following manner:
- Randomized, statistically valid survey
 - Two regional public meetings for information gathering, one pre-survey and one post-survey
 - Key person interviews with the individuals identified by the Steering Committee
 - Providing a link to the survey questions
 - Providing social media apps for the project

C. The selected Consultant will individually address all the Work Tasks identified in the RFP in a clear and concise manner that uses current data and provides future vision. Individual written summaries, analyses, recommendations, etc. specified in this document under each of the following work tasks are included by reference:

- Work Task A: Review General Information and Centre Region Background
- Work Task B: Review Agency General Information
- Work Task C: Review and Update Agency Mission Statement and Goals
- Work Task D: Conduct Public Participation Activities
- Work Task E: Agency Governance Structure
- Work Task F: Evaluate Agency Personnel
- Work Task G: Evaluate Facilities and Open Space Inventory
- Work Task H: Evaluate Facilities and Equipment Maintenance
- Work Task I: Evaluate Agency Administration
- Work Task J: Evaluate Recreation Programs
- Work Task K: Evaluate Financing of Parks and Recreation
- Work Task L: Propose Recommendations for the Future
- Work Task M: Prepare Implementation Plan and Executive Summary

D. Prior to May 7, 2019 the Consultant will provide three printed copies and one electronic copy of the draft Comprehensive Recreation, Park and Open Space Plan to Mr. Jim Steff, COG Executive Director at the following location:

Centre Region Council of Governments
2643 Gateway Drive, Suite 3
State College, PA 16801

E. Prior to June 4, 2019 the Consultant will provide three printed copies and one electronic copy of the final Comprehensive Recreation, Park and Open Space Plan to Mr. Steff at the aforementioned location.

VIII. PROPOSAL INFORMATION SHEET

I/We propose to furnish the Centre Region COG with a Comprehensive Recreation, Park and Open Space Plan as detailed in this Request for Proposals for the following price that includes all costs (i.e. travel, duplication services, communication expenses, etc.).

Total Project Cost (does not include a randomized survey \$_____

Total Cost of Conducting a Randomized Survey \$_____

Company Name _____

Company
Address_____

Owner's Name_____

Telephone_____

E-mail_____

Contact Person_____

Date_____

Exceptions to RFP_____

Hourly Rate for Work Outside of RFP \$_____

Travel Costs Associated with Work Outside RFP \$_____

IX. CONTRACT FOR PROFESSIONAL SERVICES

A proposed contract is included (beginning on next page) for your review. If it is satisfactory to you, it should be completed, executed, and submitted with the proposal. If you prefer an alternate contract, you may submit it as part of your proposal. However, the COG reserves the right to enter into the enclosed contract with the successful firm or to negotiate the terms of a professional (consulting) services contract.

[NOTE: DCNR recommends that the COG's solicitor be consulted concerning the contract form used for this RFP, including insertion of any contractual terms not addressed in this proposed contract, such as termination, breach, remedies for breach, etc.]

CONTRACT FOR PROFESSIONAL SERVICES

This Contract is made and entered into this _____ day of _____, 2018, by and between the Centre Region Council of Governments, Centre County, Pennsylvania (COG), and _____ ("Consulting Firm").

WHEREAS, the COG desires to have certain one-time professional consulting work performed involving a Comprehensive Recreation, Park and Open Space Plan for the Centre Region Council of Governments

WHEREAS, the COG desires to enter into a contract for this work pursuant to a Request for Proposals ("RFP") issued by the COG.

WHEREAS, the Consulting Firm desires to perform the work in accordance with the proposal it submitted in response to the RFP;

WHEREAS, the Consulting Firm is equipped and staffed to perform the work;

NOW, THEREFORE, the parties, intending to be legally bound, agree as follows:

THE CONSULTING FIRM WILL:

1. Provide professional consulting services in accordance with the RFP, its proposal in response to the RFP, and the Nondiscrimination/Sexual Harassment Clause, which is attached hereto and incorporated herein as Appendix A.
2. Obtain approval from the COG of any changes to the staffing stated in its proposal. However, approval will not be denied if the staff replacement is determined by the COG to be of equal ability or experience to the predecessor.

THE COG WILL:

1. Compensate the Consulting Firm based on the actual hours worked and actual reimbursable expenses for a total amount not to exceed \$_____.
2. Provide the Consulting Firm with reasonable access to COG personnel, facilities, and information necessary to properly perform the work required under this Contract.
3. Except as provided in item 4 below, make payment to the Consulting Firm within 30 days after receipt of a properly prepared invoice for work satisfactorily performed and following this schedule:
 - 20% following execution of contract

- 50% following the presentation of the draft plan to the Steering Committee
 - 20% following the presentation of the final plan to the General Forum of the Centre Region COG
4. Make final payment of 10% of the funds available to the Consulting Firm under this Contract within 30 days after final product approval by the Department of Conservation and Natural Resources.

IT IS FURTHER AGREED THAT:

1. All copyright interests in work created under this Contract are solely and exclusively the property of the COG. The work shall be considered work made for hire under copyright law; alternatively, if the work cannot be considered work made for hire, the Consulting Firm agrees to assign and, upon the creation of the work, expressly and automatically assigns, all copyright interests in the work to the COG.

2. In the performance of services under this Contract, there shall be no violation of the right of privacy or infringement upon the copyright or any other proprietary right of any person or entity.

In witness thereof, the parties hereto have executed this Contract on the day and date set forth above.

WITNESS:

FOR THE COG:

TITLE: _____

WITNESS:

FOR THE CONSULTING FIRM:

TITLE: _____

X. **ADVERTISEMENT FOR PROPOSALS**

CENTRE REGION COMPREHENSIVE RECREATION, PARK AND OPEN SPACE PLAN

The Centre Region Council of Governments (COG) in Centre County, Pennsylvania invites the submission of proposals for a one-time contract from qualified Consultants to prepare a Comprehensive Recreation, Park and Open Space Plan for the Centre Region, Centre County, Pennsylvania.

Sealed proposals (containing twelve copies) will be received until 11:00 AM prevailing time on Tuesday, August 7, 2018 at the Centre Region COG Office of Administration.

The Centre Region COG will not be responsible for any bids which are mismarked, delivered to the wrong location, or delayed in delivery or in the mail.

A copy of the RFP, general information, and detailed requirements may be obtained from the Centre Region COG Office of Administration:

Jim Steff, COG Executive Director
COG Office of Administration
2643 Gateway Drive, Suite 3
State College, PA 16801
Phone: (814) 231-3077
Fax: (814) 231-3083
E-Mail: jsteff@crcog.net
www.crcog.net

Office hours are between 8:00 AM and 5:00 PM, Monday – Friday. Proposals can be mailed or hand-delivered.

Proposals will be presented for final approval at a public meeting of the Centre Region COG General Forum. The Centre Region COG may accept or reject any or all proposals or hold all proposals for a period of ninety (90) days.

Jim Steff, Executive Director
Centre Region Council of Governments

Publish: Sunday, July 1, 2018

APPENDIX A

NONDISCRIMINATION/SEXUAL HARASSMENT CLAUSE

The Grantee agrees:

1. In the hiring of any employee(s) for the manufacture of supplies, performance of work, or any other activity required under the grant agreement or any subgrant agreement, contract, or subcontract, the Grantee, a subgrantee, a contractor, a subcontractor, or any person acting on behalf of the Grantee shall not discriminate in violation of the *Pennsylvania Human Relations Act* (PHRA) and applicable federal laws against any citizen of this Commonwealth who is qualified and available to perform the work to which the employment relates.
2. The Grantee, any subgrantee, contractor or any subcontractor or any person on their behalf shall not in any manner discriminate in violation of the PHRA and applicable federal laws against or intimidate any of its employees.
3. The Grantee, any subgrantee, contractor or any subcontractor shall establish and maintain a written nondiscrimination and sexual harassment policy and shall inform their employees of the policy. The policy must contain a provision that sexual harassment will not be tolerated and employees who practice it will be disciplined. Posting this Nondiscrimination/Sexual Harassment Clause conspicuously in easily-accessible and well-lighted places customarily frequented by employees and at or near where the grant services are performed shall satisfy this requirement.
4. The Grantee, any subgrantee, contractor or any subcontractor shall not discriminate in violation of the PHRA and applicable federal laws against any subgrantee, contractor, subcontractor or supplier who is qualified to perform the work to which the grant relates.
5. The Grantee and each subgrantee, contractor and subcontractor represents that it is presently in compliance with and will maintain compliance with all applicable federal, state, and local laws and regulations relating to nondiscrimination and sexual harassment. The Grantee and each subgrantee, contractor and subcontractor further represents that it has filed a Standard Form 100 Employer Information Report ("EEO-1") with the U.S. Equal Employment Opportunity Commission ("EEOC") and shall file an annual EEO-1 report with the EEOC as required for employers subject to *Title VII* of the *Civil Rights Act of 1964*, as amended, that have 100 or more employees and employers that have federal government contracts or first-tier subcontracts and have 50 or more employees. The Grantee, any subgrantee, any contractor or any subcontractor shall, upon request and within the time periods requested by the Commonwealth, furnish all necessary employment documents and records, including EEO-1 reports, and permit access to their books, records, and accounts by the granting agency and the Bureau of Small Business Opportunities (BSBO), for the purpose of ascertaining compliance with the provisions of this Nondiscrimination/Sexual Harassment Clause.

6. The Grantee, any subgrantee, contractor or any subcontractor shall include the provisions of this Nondiscrimination/Sexual Harassment Clause in every subgrant agreement, contract or subcontract so that those provisions applicable to subgrantees, contractors or subcontractors will be binding upon each subgrantee, contractor or subcontractor.
7. The Granter's and each subgrantee's, contractor's and subcontractor's obligations pursuant to these provisions are ongoing from and after the effective date of the grant agreement through the termination date thereof. Accordingly, the Grantee and each subgrantee, contractor and subcontractor shall have an obligation to inform the Commonwealth if, at any time during the term of the grant agreement, it becomes aware of any actions or occurrences that would result in violation of these provisions.
8. The Commonwealth may cancel or terminate the grant agreement and all money due or to become due under the grant agreement may be forfeited for a violation of the terms and conditions of this Nondiscrimination/Sexual Harassment Clause. In addition, the granting agency may proceed with debarment or suspension and may place the Grantee, subgrantee, contractor, or subcontractor in the Contractor Responsibility File.

Based on Management Directive 215.16 amended (2/24/15)

DCNR-2017-Gen
Gen-GPM – 1 Rev. 1-17