



REQUEST FOR PROPOSALS

DEVELOPMENT OF INAUGURAL PARKS AND RECREATION MASTER PLAN

June 7, 2019

SEALED SUBMITTALS DUE:
JULY 18, 2019 by 3:00 P.M.

CONTACT:

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REQUEST FOR QUALIFICATIONS AND PROPOSAL – MASTER PLAN

SECTION 1. PROJECT DESCRIPTION

The City of Lathrop, Department of Parks and Recreation hereinafter called the “CITY”, is seeking proposals from qualified consultants (Consultant) to prepare a comprehensive Parks, Facilities, and Recreation Master Plan (Parks Master Plan). Firms are invited to submit a summary of qualifications and a proposal to serve as the Master Plan Consultant.

The Master Plan will result in a valuable strategic guide and create a roadmap for ensuring an appropriate balance of facilities, services, and amenities throughout the community now and into the future. The City is seeking a system-wide approach for Parks and Recreation Services for both current and future development in order to establish goals, policies, guidelines and strategies.

All proposals received will be reviewed to ensure that all tasks within the scope requirements of the RFP have been met, in addition to evaluating the ability of the proposer to provide the required services. Failure to meet the requirements may be cause for rejection (evaluation of proposals shall be at the discretion of the City of Lathrop). All proposals that meet the requirements will be submitted to the Evaluation Committee for further evaluation. The Evaluation Committee will review qualified proposals and determine a ranking based on the proposals submitted. The Evaluation Committee may at its discretion, and in the course of its evaluation, arrange a site visit and/or interview/presentation with a short list of selected Consultants who were deemed to provide the best proposals.

All questions or requests for additional information must reference the above proposal name and must be submitted **by 1:00 p.m. on June 26, 2019** to Zachary Jones, Director – Parks and Recreation Department. Emailed questions or inquiries shall be submitted to zjones@ci.lathrop.ca.us. Questions and answers will be issued to all interested and placed on the City’s website **by 1:00 p.m. on July 3, 2019** at <http://www.ci.lathrop.ca.us/projects.aspx>.

SECTION 2. BACKGROUND

The City of Lathrop was incorporated July 1, 1989, and is located seventy (70) miles due east of San Francisco, and 50 miles south of Sacramento, in San Joaquin County. Lathrop is located at the interchange of three major freeways: Interstate 5 (I-5), Interstate 205 (I-205), and State Route 120 (SR-120). The City has an area of 22 square miles of level terrain, and a population of approximately 24,000 residents.

The City operates a growing parks system that currently consists of 18 park and recreation facilities totaling approximately 84 acres. In 2014, the City committed to the development of a full-service Parks and Recreation Department which has resulted in the need to develop a Parks and Recreation Master Plan. This Master Plan will serve as the inaugural Master Plan for our City. Over the next five years we anticipate the construction of a number of new parks and recreation facilities, the re-design of existing facilities, the approval and development of additional residential units, and a substantial growth in population.

Currently our Parks and Recreation Administration has guided development and recreation program operations based on National Recreation and Park Association (NRPA) and California Parks and Recreation Society (CPRS) guidelines. It is anticipated the Master Plan will incorporate the most current planning models from both NRPA and CPRS and identify trend setting recreation programs and services with appropriate fees and charges to establish a best-in-class recreation service program. It is essential that the Master Plan establishes standards and schedules, while

REQUEST FOR QUALIFICATIONS AND PROPOSAL – MASTER PLAN

providing additional benchmarks in building this best-in-class system. The Consultant must demonstrate the ability to work well in the public outreach process, including the management of public meetings that, at times, may involve controversial issues. Additionally, the Consultant will be required to effectively coordinate this inaugural Master Plan effort with Parks and Recreation Administration.

The City is looking for a Consultant, or team of consultants, with one consultant acting as the lead, to perform the outlined scope of services (see Section 4 below). This effort will require experience in the following disciplines:

- Public Meeting Facilitation, Community Outreach, Workshops, Focus Groups
- Demographics, Demographics Trends, Demographics Analysis
- Growth Statistics, Statistically Valid Surveys, Priority Needs
- Needs Assessment and Inventory of Parks, Facilities, and Recreation Services
- Levels of Service, Standards, Classifications
- Cost Recovery, Annual Cost of Operation
- Development Planning, Park Planning, Park Refurbishment
- Land Use, Open Space, Architecture and Natural Resources Planning

Section 3. PROJECT SCHEDULE

Proposal Responses Due July 18, 2019 by 3:00 p.m.

The following is a proposed schedule for this project. Your proposal may include a modified schedule.

<u>DELIVERABLES</u>	<u>COMPLETION DATE</u>
Proposal Responses Due	July 18, 2019 by 3:00 p.m.
Selection Committee Review	Week of August 5, 2019
Consultant Interviews (if necessary).....	Week of August 19, 2019
City Council Approval of Consultant.....	Week of September 9, 2019
Consultant Notified of Results	Week of September 16, 2019
Consultant Kick off Meeting.....	September 23, 2019
Completion of Tasks #1, #2, #3	November 18, 2019
Completion of Tasks #4, #5, #6	December 9, 2019
Completion of Tasks #7, #8, #9, #10	January 13, 2020
Completion of Tasks #11, #12	February 10, 2020
Draft Master Plan and Presentation City Council	March 9, 2020
Review of Master Plan by Parks and Recreation Commission	April 2, 2020
Final Master Plan and Presentation City Council.....	April 13, 2020

SECTION 4. SCOPE OF WORK

Task #1: **Demographic Assessment**
 Using existing data and other documents as identified by the consultant, the consultant will review and describe the demographics of the City including, but not limited to, population, age characteristics, ethnicity, educational attainment, and income/employment.

REQUEST FOR QUALIFICATIONS AND PROPOSAL – MASTER PLAN

- Task #2: **Trend Analysis**
Using existing data and other documents as identified by the consultant, the consultant will review and describe the trends likely to impact the City. This includes, but not limited to, demographic trends, crime trends, demand for services, health trends, and other elements identified by the consultant as relevant in designing the future of the Park and Recreation Department.
- Task #3: **Civic Engagement**
Identify, describe, and implement a comprehensive strategy and methodology for citizen involvement. Assure the residents, user groups, non-user groups, associations, and other stakeholders are provided an opportunity to participate in the development of this Master Plan (through public meeting or use of technology). Conduct at least three (3) public community meetings and a minimum of five (5) focus groups (participants to be determined). Conduct a minimum of eight (8) individual stakeholder interviews. Serve as professional facilitators to gather specific information about services, use, preferences and any agency strengths, weaknesses, opportunities and threats. Provide well-organized and directed activities, techniques and formats that will ensure that a positive, open and proactive public participation process is achieved. Provide written records and summaries of the results of all public process and communications strategies.
- Task #4: **Completion of a Statistically Valid City Wide Survey**
Conduct a City wide statistically valid survey based on total population data. The survey should be designed to collect appropriate and relevant feedback from community members. The survey shall have a return rate that accurately represents a sampling of the community demographics to identify community needs, issues and gaps on Parks and Recreation programs and facilities. Consultant will provide the methodologies and processes conducted as part of community survey and how data was collected within the Master Plan.
- Task #5: **Community Needs Assessment**
Compare the resources of the City of Lathrop with similar municipal Parks and Recreation departments in San Joaquin County in regards to parks, open space, buildings and other recreation facilities; and services, usage and staffing levels. Using existing data, review and describe the City's interaction and role with other agencies both politically and geographically.
- Complete a Community Needs Assessment to identify current and future Parks and Recreational needs and interests; identify existing gaps in programs, services and facilities, and develops short term, mid-term, and long term recommendations that address deficiencies and service delivery.
- Task #6: **Fees, Charges and Cost Recovery Analysis**
Conduct a cost recovery analysis of user fee analysis for facilities and recreation programs. This analysis must include a benchmarking of similar fees of local competitors, as well as options for improving the cost recovery levels to reduce program subsidy were necessary. This analysis should also include the cost recovery formula for future use.

REQUEST FOR QUALIFICATIONS AND PROPOSAL – MASTER PLAN

- Task #7: **Inventory of Parks and Recreation Facilities**
Compile a comprehensive inventory of all City Parks and Recreation facilities. Confirm the location and size of existing parks and facilities. The analysis shall also consider the capacity of each amenity found (playgrounds, ball fields, trails, natural areas, special facilities, etc.) as well as functionality, accessibility, condition, comfort and convenience. List each locations amenities, its current condition, estimated age, and provide a replacement schedule with estimated costs. Provide a qualitative evaluation of amenities per park report (i.e. equal balance of amenities in each park) and develop a set of prioritized recommendations for improvements needed within existing parks, open space, buildings and other recreational facilities.
- Task #8: **Identification of New Park and Recreation Facilities**
Evaluate potential need and provide recommendations and options regarding suitable sites for future park and recreation facilities; including, but not limited to, an aquatics center, gymnasium, community center, senior center, walkability / trails and a multi-use field sports complex. Included both the City owned land and potential partner sites. Identify and develop a set of prioritized recommendations for additional parks, open space, buildings and other recreation facilities that may be needed in the City of Lathrop. Address size, location, layout, uses, use of standard amenities, and constraints to provide both guidance and flexibility for future development and identify and develop a set of prioritized recommendations for additional parks, open space, facilities and other recreation facilities that may be needed in the City of Lathrop. Outline associated costs for future opportunities with new Parks or Recreation facilities.
- Task #9: **Analysis of Programs, Services and Maintenance Standards**
Provide an assessment and analysis of the Parks and Recreation Department's current level of recreation programs, services and maintenance in relation to present and future goals, objectives, and directives. Provide an analysis of the best possible providers for programs and services and identify and discern any unnecessary duplication of services through public and private program providers. Lastly, identify current and future trends for implementation and the impact they will have on the demand and delivery of Parks and Recreation services.
- Task #10: **Climate, Biological, Natural Resources and Cultural Legacy**
Gather, review and describe the climate, biological resources, natural resources and cultural legacy of the City as these affect development of the park system.
- Climate data may include prevalence of summer heat and the need for water and shade in park design.
 - Biological resource data may include wetland consideration, tree inventory and preservation, etc.
 - Natural resource information should include information on open space preservation potential, and rivers and creeks within City boundaries.
 - Cultural legacy information should describe historic and modern features of the built environment, and historic preservation within parks.

REQUEST FOR QUALIFICATIONS AND PROPOSAL – MASTER PLAN

Task #11: **Capital Improvement Funding**
Review and describe funding sources, including background history, and how the sources are used to fund park capital improvements. This includes park impact fees, Landscape and Lighting (L&L), Benefit Zone funding, Quimby fees, etc.

Task #12: **Action Plan**
Develop a prioritized plan of action which will include identified issues and challenges; strategies; probable costs, including staffing, facility and maintenance needs; and an analysis of potential funding sources and mechanisms for the parks, open space, buildings and other recreation facilities.

Action plan should include attainable goals along with measurable timelines, policies and standards to support the Master Plan. This shall incorporate the department’s brand identity and provide the City with a clear action plan for implementation.

Final Master Plan

All text shall be prepared with Microsoft Office Word. All text documents will be prepared with “track changes” active for easy identification of changes between versions. Drawings will be prepared in AutoCAD format. Text shall be 8-1/2” x 11” and drawings shall be 11” x 17” appropriately placed and folded to an 8-1/2” x 11” configuration. Presentation graphics will be 24” x 36” in hardcopy form (or other format suitable for presentation at public meetings and agreed to by the City) and in Microsoft PowerPoint. The consultant will make all work available electronically so City staff can post on the City website. The City will provide pertinent data needed to support the Master Plan update process. The consultant shall gather additional information as needed from the City to supplement data. The consultant shall prepare a draft Master Plan prior to the final Master Plan to include task one through twelve at a minimum. For both the draft and the final Master Plan, twenty hard copies, including maps and figures shall be provided. An electronic version that can be edited (Microsoft Word) is also required. This information will also include electronic and hard copies of any maps in AutoCAD format. Prior to presenting to both the draft and the final Master Plan to City Council, meetings with City Parks and Recreation Administration staff will be required to address any changes deemed necessary.

SECTION 5. BASIS FOR COMPENSATION

The consultant’s submittal shall be a fixed fee proposal to conduct the scope of services requested, submitted in a separate, sealed envelope from the proposal. The City shall prepare the Agreement for Services, and payments to the consultant shall be based on progress of work and receipt of deliverables.

Completion of Each Task	3% ea.
Draft Master Plan	12%
Presentation of Draft Master Plan to Parks and Recreation Commission.....	12%
Presentation of Draft Master Plan to City Council.....	20%
Final Master Plan Presented and Adopted by City Council.....	20%

SECTION 6. PROPOSAL REQUIREMENTS

Please refrain from submitting general marketing materials which do not explicitly respond to the questions below. Proposals should not exceed 20 pages in length excluding a cover letter of no more than two pages, plus resumes and appendices. Proposals should specifically address the

REQUEST FOR QUALIFICATIONS AND PROPOSAL – MASTER PLAN

following topics in 8-1/2" x 11" bound or stapled format. Proposal pages must be consecutively numbered, include a table of contents, and have information in the order shown below.

6.1 Project Overview

A narrative description of your understanding of the project, the purpose, and issues involved. The City will assess your understanding of all aspects of the project based on the project overview.

6.2 Scope of Work

Provide a detailed description of the proposed approach to the project as described above. The description shall include details to implement the tasks described in the Scope of Work and any recommended revisions to the listed tasks. In addition, the Scope of Work shall include details of the procedures and methodology that the consultant will use to assure the timely completion of all phases of the project.

6.3 Modifications

Provide a description of any modifications to the project scope that the consultant believes will improve the quality or effectiveness of the project. The description should identify the impact on the project schedule and cost that these modifications would have if accepted.

6.4 Schedule

Provide a project schedule for completing the Scope of Work including all major outputs and meetings. Time should be allocated for City staff review. This should take into account the City's desire to complete the project no later than April 13, 2020.

6.5 Deliverables

The consultant should prepare a list of deliverables based on the Scope of Work. Include a description of how your firm will conduct project review meetings and whether meetings would be in person or by another method.

6.6 Project Team

Describe the consultant team organization including the Project Principal, Project Manager and all sub-consultants, including hourly rates, qualifications and experience. The information should include the expected amount of involvement and time commitment for each of these individuals. Include an organization chart indicating roles of all individuals and firms involved in this project.

6.7 Project Costs

Identify costs by each task in the Scope of Work. Provide an hourly rate schedule for those job classifications to be billed to the project and identify all other costs to be billed to the project. Identify the indirect component of each hourly rate and include a brief explanation of how the component is established. Include any adjustments that are predicted to occur during the life of the project.

6.8 Related Experience

Provide a summary of similar projects that the consultant, or the proposed team, has completed. The description of each project shall include the year(s) during which the work was performed and a description of the process and deliverables. The firm's role in the project should also be described (prime-consultant, sub-consultant, etc.). Document your firm's ability to complete these projects on schedule and within budget.

REQUEST FOR QUALIFICATIONS AND PROPOSAL – MASTER PLAN

6.9 **References**

Provide a minimum of three references for which your firm and project team members have provided similar services. Include the name, address and telephone number of the client's representative.

6.10 **Conflicts of Interest**

The proposal should identify any actual, apparent or potential conflicts of interest that may resolute from the performance of proposed services. Please indicate any current or recent associations with the local governments within San Joaquin County.

6.11 **Exceptions to Professional Services Agreement Terms**

The Consultant will be expected to contract with the City using the City's Professional Services Agreement, which is provide below. A list of any exceptions to the Professional Services Agreement must be identified in the proposal. Proposal responses that do not include the above required items will be deemed non-responsive and will not be considered.

6.12 **Proprietary Information**

Any information submitted in a proposal to this RFP which the consultant considers proprietary must be identified as such and include the legal basis for a claim of confidentiality. The City will not assert the confidentiality of such information unless the consultant executes and submits a written agreement prepared by the consultant to defend and indemnify the City for any liability, costs and expenses incurred in asserting such confidentiality as part of the proposal. The final determination as to whether or not the City will assert the claim of confidentiality on behalf of the consultant is in the sole discretion of the City.

6.13 **Insurance**

The proposal shall include a summary of the consultant's present and proposed insurance (general liability, automobile liability, workers' compensation, employer's liability and professional liability for the duration of the project.

SECTION 7. PROPOSAL EVALUATION CRITERIA

The responses to the RFP will be evaluated according to the following related criteria:

1. Responsiveness to the RFP.
2. Firm qualifications and experience in work similar or equal to this project.
3. Project team qualifications, experience and organization.
4. Demonstrated ability to lead, facilitate and coordinate projects involving community participation.
5. Approach, adherence to scope, cost of services
6. Schedule and availability.
7. Oral Interview (if necessary).

Proposals will be reviewed based upon evaluation criteria above. The most qualified firms will be invited for an oral interview/presentation. The Consultant team listed in the response must be present at the oral interview. Ranking of firms will be based upon the proposal and the interview. The City will negotiate with the highest ranked firm. If an agreement is not reached, negotiation will be terminated and started with next highest ranked firm. This process will continue until an

REQUEST FOR QUALIFICATIONS AND PROPOSAL – MASTER PLAN

agreement is reached. The selection of the consultant, including the project scope and cost, will be presented to the City Council for approval.

SECTION 8. SUBMISSION REQUIREMENTS

Proposals must be submitted to the following address with a label detailed as noted below:

- **City of Lathrop**
Subject: RFP Submittal - Parks and Recreation Master Plan
Attn: Zachary Jones, Director – Parks and Recreation Department
390 Towne Centre Drive
Lathrop CA 95330
To be opened Thursday, July 18, 2019

- All proposals must be received **on Thursday, July 18, 2019 by 3:00 p.m.**
- Submittals by fax or e-mail will **NOT** be accepted.
- Proposals received after date and time listed above will **NOT** be accepted.
- Consultant must provide five original copies of the proposal at the time of submission.

All questions regarding the RFP should be directed to Zachary Jones at (209) 941-7385 or zjones@ci.lathrop.ca.us.

SECTION 9. ADDITIONAL INFORMATION

The City reserves the right to:

- Reject any and all proposals, or any part thereof; and
- Waive an informality in the proposals; and
- Accept the proposal that is in the best interest of the County.

All completed work becomes property of City of Lathrop, California.

ATTACHMENTS: Appendix A: Standard Professional Services Agreement and Terms.